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ABSTRACT

This curriculum guide for the middle grades contains materials for a 1-semester course that are designed to help students develop a useful career development plan, especially for those interested in the fields of business and marketing. The guide is organized into seven units that cover the following: (1) the world of business; (2) information systems; (3) accounting and finance; (4) administrative support; (5) marketing; (6) management; and (7) small business and entrepreneurship. Units have these contents: competencies and objectives, student activities keyed to suggested resources, student activity sheets, overhead transparency masters, teacher information sheets, questions for discussion, and teacher keys. (KC)

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ED 360 491

MIDDLE GRADES EXPLORATORY VOCATIONAL AND TECHNICAL EDUCATION

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EXPLORING
BUSINESS & MARKETING

Curriculum Guide
1993

FOREWORD

The new exploratory vocational and technical education program for the middle grades will result in the student being able to make good decisions at school, in the community, and within the family. The experiences which are a part of the program will provide an essential foundation for the development of a realistic, useful career development plan for each student.

The student will examine self and the changing nature of the workplace and employ contemporary and emerging technology to explore and define his/her role in the global community.

I hope this guide will be useful to you and to your students.

Bob Etheridge
State Superintendent
of Public Instruction

ACKNOWLEDGMENT

Business Education curriculum materials are developed with the assistance of a number of dedicated business educators. The combined experiences of the team members provide the range and depth needed for challenging competencies and realistic activities.

Special recognition is due the **Exploring Business and Marketing** team members for the extra time and effort they devoted to developing a product that is teacher and student "friendly." The suggested activities and resources will be a tremendous asset to teachers in developing lesson plans that provide for varying abilities and learning styles.

Team leaders were Nancy Lancaster for the course guide and Jan Ledwith for the test-item bank.

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The Vocational and Technical Education Support Team and the Business Education Consultant staff acknowledge with sincere appreciation the contributions of each team member.

USING THE CURRICULUM GUIDE

Welcome to the 1993 edition of the **Exploring Business and Marketing** Curriculum Guide! This guide has been designed for ease of use, need for minimal supplementary resources, and for maximum student/teacher involvement. Listed below are a number of teaching suggestions that will help make this guide more effective in your classroom.

The guide has been divided into seven units.

* A. THE WORLD OF BUSINESS--Economic systems, the nature of business, business career opportunities, employment trends, and leadership development.

* B. INFORMATION SYSTEMS--Functions of information systems in business, career opportunities, simulation of information system tasks, and personal interest evaluation.

* C. ACCOUNTING AND FINANCE--The role of accounting and financial services in business, career opportunities, simulation of both accounting and financial service tasks, and personal interest evaluation.

* D. ADMINISTRATIVE SUPPORT--The functions of administrative support personnel, career opportunities, simulation of administrative support tasks, and personal interest evaluation.

* E. MARKETING--The role of marketing in the economy, career opportunities, simulation of marketing tasks, and personal interest evaluation.

* F. MANAGEMENT--The role of management in business, career opportunities, situational role-playing, simulation of managerial activities using software applications, and personal interest evaluation.

* G. SMALL BUSINESS/ENTREPRENEURSHIP--The role of small businesses in the economy and the role of entrepreneurs in small business, characteristics of successful entrepreneurs, situational role-playing, simulation of entrepreneurial activities using software applications, and personal interest evaluation.

The entire curriculum has been designed to incorporate hands-on activities throughout the semester. Platform-specific activities have been avoided to allow you the flexibility to work with whatever brand of computers and software you have available.

Page numbering has been done in the following format:

The first letter corresponds with the unit.
The next numbers correspond with the competency and objective numbers.
The suffix letters define the use of that page:

- **A** = Student Activity Sheets to be duplicated
- **T** = Overhead transparency masters
- **TIS** = Teacher Information Sheets to be used for teacher guidance in assuring that the major points of the unit that are included in VoCATS questions are included in class discussions.
- **TK** = Teacher Keys for activities

Therefore, the cover sheet for an objective will be numbered with the unit number, competency and objective number (A101), and does not need to be duplicated. The student activity sheets will be numbered A101-A1, A101-A2, etc. The overhead transparency masters will be numbered A101-T1. Teacher information will be numbered A101-TIS1, and teacher keys will be numbered A101-TK1.

It is suggested that students be asked to purchase a three-ring binder at the beginning of the semester in which to keep their study sheets and graded activities. The beginning activity sheets give the basic information about the topic at hand. They are intended to be the foundation for class discussion and teacher explanation. In the activities that follow, an effort has been made to incorporate activities that address all learning styles. Whenever possible, field trips and guest speakers should be included to heighten interest in the topic. It is suggested that guest speakers be videotaped for future presentations when a speaker is not readily available.

It will be necessary for students to be given general instructions in the use of word processing, databases, spreadsheets, graphics applications, and other available technology. This can be easily done during Unit B on Information Systems. The software used is flexible, but should be relatively simple to use.

Suggestions for improvement and a copy of new/additional activities that might be added to the guide should be sent to:

BUSINESS EDUCATION
EDUCATION BUILDING, 6TH FLOOR
301 NORTH WILMINGTON STREET
RALEIGH NC 27601-2825

VoCATS
Course Blueprint

Business/Marketing Education

Course Name: Exploring Business and Marketing
Course Number: 6208

North Carolina Department of Public Instruction
Bob Etheridge, State Superintendent

Division of Vocational and Technical Education Services
Business/Marketing Education
Raleigh, North Carolina **Spring 1993**

2/18/93

VoCATS Course Blueprint

A course blueprint is a document laying out the scope of the curriculum for a given course/program.
Shown on the blueprint are the units of instruction, the core competencies in each unit, and the specific objectives for each competency. The blueprint illustrates the recommended sequence of the units and competencies, the weight or relative importance of the objective within the course or unit, and the recommended number of hours to be devoted to each.
The blueprint is intended to be used by teachers in planning the course of work for the year, preparing daily lesson plans, and constructing instructionally valid tests.
The material that appears in this blueprint replaces the contents of the Teacher Handbook developed in 1985.
For additional information about this blueprint, contact program area staff. For additional information about the Vocational Competency Achievement Tracking System, contact program area staff or the Program Support Unit, Division of Vocational and Technical Education Services, 301 North Wilmington Street, Raleigh, North Carolina 27601-2825 919/715-1675.

Interpretation of Columns on VoCATS Course Blueprints

No.	Heading	Column Information
1	Seq Day1	Blank column reserved for local sequencing; Day 1-for use in noting first day of instruction for this unit, competency, and/or objective.
2	Test Pts	Blank column for use in recording number of points calculated to be on tests (Pre-Interim-Post). Calculations are based on the percent in Columns 4 and/or 5.
3	Time Hrs	Shows **suggested** amount of time needed for instruction and learning. For example, 2.5 is read as 2 1/2 hours.
4	UNIT Weight	A percentage indicates the relative importance or weight of each competency within a specific unit or each objective within a specific unit. Information in Column 4 is used to plan the yearly calendar of work and as a Test Blueprint for interim tests.
5	COURSE Weight	A percentage indicates the relative importance or weight of each unit within the total course or program, each competency within the total course or program, or each objective within the total course or program. Information in Column 5 is used to plan the yearly calendar of work and as a Test Blueprint for pretests and posttests.
6	Type Behavior	Classification of outcome behavior in competency and objective statements. (C=Cognitive; P=Psychomotor; A=Affective.)
7	Related Skill Area	Related Skills codes: A=Arts; C=Communications; H=Health/Safety; J=JTPA; M=Math; SC=Science; SS=Social Studies.
8	Level	Level 1, 2, or 1-2; NA=Not Applicable
9	Core Supp	Designation of the competencies and objectives as Core or Supplemental. Competencies and objectives designated Core must be included in the yearly calendar of work.
10	Comp# Obj.#	Comp=Competency number (three digits); Obj=Objective number (competency number plus two-digit objective number).
11	Unit Titles/ Competency and Objective Statements	Statements of unit titles, competencies per unit, and specific objectives per competency. Each competency statement or specific objective begins with an action verb and makes a complete sentence when combined with the stem "The student will be able to. . ." (The stem appears once in Column 11.) Outcome behavior in each competency/objective statement is denoted by the verb plus its object.

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BUSINESS EDUCATION

COURSE BLUEPRINT for 6208 (CIP# 37 0103): EXPLORING BUSINESS AND MARKETING

[Course Length: 1 semester; Class Length: 1 period]

Teacher: **School:** **LEA:**

Class Period(s): Circle 1st 2nd 3rd 4th 5th 6th 7th **Room** **School Year:199 -199 .**

Seq. Day]	Test Pts.	Time Hrs.	UNIT Weight	COURSE Weight	Type Behavior	Related Skill Areas	Level	Core Supp	Comp# Obj #	Unit Titles/Competency and Objective Statements (The student will be able to:)
1	2	3	4	5	6	7	8	9	10	11 BE:BP:6208 [Spring 1993]: Page 1
		8	100%	9%					A	THE WORLD OF BUSINESS
		3	38%	3%	C1	CISS	NA	Core	001.00	**Describe characteristics of economic systems.**
		2	25%	2%	C1	CISS	NA	Core	001.01	Describe characteristics of the free enterprise system.
		1	13%	1%	C1	CISS	NA	Core	001.02	Describe the characteristics of other economic systems.
		5	62%	6%	C2A	CISS	NA	Core	002.00	**Explain the nature of business and business career opportunities including employment trends.**
		1	12%	2%	C2	CISS	NA	Core	002.01	Discuss the purpose and activities of business.
		1	13%	1%	C2	CISS	NA	Core	002.02	Explain the impact of technology on business activities.
		1	13%	1%	C2A	CISS	NA	Core	002.03	Explain and show awareness of the ethical considerations and practices of business.
		1	12%	1%	C2	CISS	NA	Core	002.04	Explain employment trends in business.
		1	12%	1%	C2	C	NA	Core	002.05	Explain leadership development in business.
		12	100%	13%					B	INFORMATION SYSTEMS
		3	25%	3%	C2	C	NA	Core	003.00	**Explain the functions of information systems in businesses.**
		1	8%	1%	C2	C	NA	Core	003.01	Explain information systems.
		2	17%	2%	C2	C	NA	Coe	003.02	Explain how information systems operate in business.
		9	75%	10%	C3P	C	NA	Core	004.00	**Evaluate personal interests and aptitudes in pursuing a career in information systems and simulate related activities.**
		2	17%	1%	C3	C	NA	Core	004.01	Investigate the current career opportunities in information systems.
		1	8%	1%	C3	C	NA	Core	004.02	Assess the education, experience and other requirements for a career in information systems.
		5	42%	7%	C3P	C	NA	Core	004.03	Simulate activities performed by information systems personnel.
		1	8%	1%	C3	C	NA	Core	004.04	Evaluate personal options in pursuing a career in information systems.
		15	100%	17%					C	ACCOUNTING AND FINANCE
		5	34%	6%	C2	CIM	NA	Core	005.00	**Explain the role of accounting and financial services in business.**
		1	7%	1%	C2	CIM	NA	Core	005.01	Explain the basic accounting equation.

Seq. Day1	Test Pts.	Time Hrs.	UNIT Weight	COURSE Weight	Type Behavior	Related Skill Areas	Level	Core Supp	Comp# Obj #	Unit Titles/Competency and Objective Statements (The student will be able to:)
1	2	3	4	5	6	7	8	9	10	11 BE:BP:6208 [Spring 1993]: Page 2
		2	13%	2%	C1	CIM	NA	Core	005.02	Describe the types and purposes of accounting statements.
		1	7%	2%	C2	CIM	NA	Core	005.03	Explain the role of financial services in business.
		1	7%	1%	C2	CIM	NA	Core	005.04	Explain the uses of computers in accounting and financial services.
		10	66%	11%	C3P	CIM	NA	Core	**006.00**	**Evaluate personal interests and aptitudes in pursuing a career in an accounting and finance occupation and simulate typical problems.**
		2	13%	1%	C3	C	NA	Core	006.01	Investigate current opportunities in accounting and finance occupations.
		1	7%	1%	C3	CIM	NA	Core	006.02	Assess the education, experience and other requirements for accounting and finance occupations.
		3	19%	4%	C3P	CIM	NA	Core	006.03	Simulate problems typical for accounting workers using database and spreadsheet software.
		3	20%	4%	C3P	CIM	NA	Core	006.04	Simulate problems typical for finance workers.
		1	7%	1%	C3A	C	NA	Core	006.05	Evaluate personal options in pursuing a career in an accounting or finance occupation.
		15	100%	17%					D	ADMINISTRATIVE SUPPORT
		4	27%	5%	C2	CIM	NA	Core	**007.00**	**Explain the functions of administrative support personnel.**
		2	13%	2%	C2	C	NA	Core	007.01	Explain how administrative support personnel use written and verbal communications.
		1	7%	1%	C2	CIM	NA	Core	007.02	Explain the duties of administrative support personnel.
		1	7%	2%	C2	CIM	NA	Core	007.03	Explain the use of computers by administrative support personnel.
		11	73%	12%	C3PA	CIM	NA	Core	**008.00**	**Evaluate personal interests and aptitudes in pursuing a career in administrative support occupations and simulate typical problems.**
		2	12%	1%	C3	C	NA	Core	008.01	Investigate the current opportunities in administrative support occupations.
		1	7%	1%	C3	C	NA	Core	008.02	Assess the education, experience and other requirements for administrative support occupations.
		7	47%	9%	C3P	CIM	NA	Core	008.03	Simulate problems typical of administrative support occupations using appropriate technology such as word processing, desktop publishing, graphics and data base software.
		1	7%	1%	C3A	C	NA	Core	008.04	Evaluate personal options in pursuing a career in an administrative support occupation.
		15	100%	16%					E	MARKETING
		4	27%	4%	C2	CISS	NA	Core	**009.00**	**Explain the role of marketing in the economy.**
		1	7%	1%	C2	CISS	NA	Core	009.01	Explain the role and importance of marketing in a free enterprise system.
		2	13%	2%	C2	CISS	NA	Core	009.02	Explain the marketing functions.
		1	7%	1%	C2	C	NA	Core	009.03	Explain the use of computers in marketing.
		11	73%	12%	C3PA	AICIM	NA	Core	**010.00**	**Evaluate personal interests and aptitudes in pursuing a career in marketing and simulate related activities.**
		2	13%	1%	C3	C	NA	Core	010.01	Investigate the current career opportunities in marketing.
		1	7%	1%	C3	C	NA	Core	010.02	Assess the education, experience and other requirements for marketing occupations.

Seq. Day1	Test Pts.	Time Hrs.	UNIT Weight	COURSE Weight	Type Behavior	Related Skill Areas	Level	Core Supp	Comp# Obj.#	Unit Titles/Competency and Objective Statements (The student will be able to:)
1	2	3	4	5	6	7	8	9	10	11 BE:BP:6208 [Spring 1993]: Page 3
		7	46%	9%	C3P	AICIM	NA	Core	010.03	Simulate activities typical in marketing occupations using appropriate technology, such as word processing, graphics, data base, desktop publishing, computer simulations, multimedia and electronic equipment.
		1	7%	1%	C3A	C	NA	Core	010.04	Evaluate personal options in pursuing a career in marketing.
		12	100%	13%					F	MANAGEMENT
		3	25%	3%	C2	CISS	NA	Core	011.00	**Explain the role of management in business.**
		1	9%	1%	C2	CISS	NA	Core	011.01	Explain the levels and responsibilities of management.
		1	8%	1%	C2	C	NA	Core	011.02	Explain how managers use interpersonal communication skills.
		1	8%	1%	C2	C	NA	Core	011.03	Explain the use of computers by managers.
		9	75%	10%	C3PA	CIHIMISC ISS	NA	Core	012.00	**Evaluate personal interest and aptitudes in pursuing a career in management and simulate related activities.**
		1	9%	1%	C3	C	NA	Core	012.01	Investigate current career opportunities in management.
		1	8%	1%	C3	C	NA	Core	012.02	Assess the education, experience and other requirements for different levels of management.
		2	17%	2%	C3	CIHISCI SSI	NA	Core	012.03	Examine situations that are encountered by managers.
		4	37%	5%	C3P	CIMISS	NA	Core	012.04	Simulate managerial activities using computer software applications.
		1	4%	1%	C3A	C	NA	Core	012.05	Evaluate personal options in pursuing a career in management.
		13	100%	15%					G	SMALL BUSINESS/ENTREPRENEURSHIP
		5	38%	6%	C2	CIMISS	NA	Core	013.00	**Explain the roles of small businesses in the economy and the role of entrepreneurs in small business.**
		1	7%	1%	C2	CISS	NA	Core	013.01	Explain the value of small business to the free enterprise system.
		1	7%	2%	C2	CISS	NA	Core	013.02	Explain the role of entrepreneurs in small business.
		1	8%	1%	C2	CIMISS	NA	Core	013.03	Explain the steps involved in starting a small business.
		1	8%	1%	C1	CIMISS	NA	Core	013.04	Identify reasons for small business failure.
		1	8%	1%	C2	CIMISS	NA	Core	013.05	Explain the use of computers by entrepreneurs.
		8	62%	9%	C3PA	CIHIMISS	NA	Core	014.00	**Evaluate personal interests and aptitudes in becoming an entrepreneur and simulate related activities.**
		1	8%	1%	C2	C	NA	Core	014.01	Explain the characteristics and requirement of a successful entrepreneur.
		1	7%	1%	C3	CIHIMISS	NA	Core	014.02	Examine situations encountered by entrepreneurs.
		5	39%	6%	C3P	CIMISS	NA	Core	014.03	Simulate entrepreneurial activities using software applications.
		1	8%	1%	C3A	C	NA	Core	014.04	Evaluate personal options in pursuing a career as an entrepreneur.

TABLE OF CONTENTS

Foreword ii

Acknowledgement iii

Using the Curriculum Guide iv

Course Blueprint vi

Unit A The World of Business
- Competency Goal 1 . . . . . A101
- Competency Goal 2 . . . . . A201

Unit B Information Systems
- Competency Goal 3 . . . . . B301
- Competency Goal 4 . . . . . B401

Unit C Accounting and Finance
- Competency Goal 5 . . . . . C501
- Competency Goal 6 . . . . . C601

Unit D Administrative Support
- Competency Goal 7 . . . . . D701
- Competency Goal 8 . . . . . D801

Unit E Marketing
- Competency Goal 9 . . . . . E901
- Competency Goal 10 . . . . . E1001

Unit F Management
- Competency Goal 11 . . . . . F1101
- Competency Goal 12 . . . . . F1201

Unit G Small Business/Entrepreneurship
- Competency Goal 13 . . . . . G1301
- Competency Goal 14 . . . . . G1401

Appendix
- Tree of Knowledge
- Is This Career Right for You?
- Equipment Standards

Exploring Business and Marketing

Unit A:

The World of Business

COURSE: Exploring Business & Marketing

UNIT: The World of Business

COMPETENCY: 1.00 Describe characteristics of economic systems.

OBJECTIVE: 1.01 Describe characteristics of the free enterprise system.

TIME: 2 class periods (Activities continued on next page)

ACTIVITY	RESOURCES
1. Define natural and human resources, explain the differences between them, and give examples.	Divide students into small groups and have them list on chart paper various human and natural resources. Display these charts for use in Activity 2.
2. Have student small groups to work together to make a collage representing natural resources on one half and human resources on the other half. Display these collages as reinforcement during the study of economic systems.	Old magazines, glue, posterboard, and scissors.
3. Discuss with the class or pose questions to small groups the differences between the actual need for a good or service as opposed to merely wanting that same good or service.	Wants and Needs Information Sheet (A101-A1)
4. Ask groups to list goods or services they feel they truly need. Make a similar list of items they feel are desirable but not necessary. Compare the lists, deciding whether any of the items could move to the other list.	

A101--Continued on Next Page

COURSE: Exploring Business & Marketing

UNIT: The World of Business

COMPETENCY: 1.00 Describe characteristics of economic systems.

OBJECTIVE: 1.01 Describe characteristics of the free enterprise system.

TIME: 2 Class Periods

ACTIVITY	RESOURCES
5. Discuss with the class or pose questions to small groups the relationships of factors that influence supply and demand and eventually the job market.	Information Sheet: The System of Supply and Demand (A101-A2)
6. Obtain and view the film "Kingdom of Mocha." Discuss the film. Compare how supply and demand help determine the price of goods and services.	Modern Talking Picture Service 5000 Park St. North St. Petersburg, FL 33709 1-800-243-6877
7. Reinforce the economic terms for this unit using various exercises.	Economic Terminology (A101-A3) Economics Crossword (A101-A4, CL-4, and TK-2) Complete the Economic Terms (A101-A5 and TK-1)

NEEDS AND WANTS INFORMATION SHEET

A **need** is something required or essential which is lacking. (You need to eat.) A **want** is something that's desired but not always essential. (You want to eat a candy bar.)

If you think about it, all people have needs and wants. At any one time, people can have a variety of needs and wants and must decide which is the most important. Once that need or want has been satisfied, you can concentrate on other needs and wants.

Fortunately, all people do not need and want the same things at the same time. For example, the candy bar you wanted to purchase may not appeal at all to your classmate. This difference in people's needs and wants accounts for the variety of goods and services which are available.

Also, people's needs and wants change. The things which you need and want at one point in your life become less important, while other needs and wants take their place. For example, in the winter you might want a warm coat. However, what happens when the summer arrives? Your desire for the warmth of a coat is replaced by a desire for the comfort of air conditioning or for a swim in the pool.

Many factors affect your needs and wants. These factors cause your needs and wants to change. Some of these factors are:

* age
* educational level
* marital status
* income level
* parenthood
* place of residence.

Can you think of ways those factors affect your own needs and wants? List the ways below. Also, list any other factors that you think might affect your wants and needs.

A101-A1 (Cont'd. on next page)

Other factors exist in your environment which also affect your needs and wants. These factors include the influence of friends and relatives, your culture, the seasons of the year, and economic conditions.

Why should we, as business people, be concerned with people's needs and wants? It's simple! People buy goods and services to satisfy their individual needs and wants. For example, people might buy a pair of shoes because of a desire to be like their friends, for comfort, or for protection. A salesperson must understand that customers frequently buy the same product for entirely different reasons. For example, two customers buy the same vacuum cleaner. One purchases the cleaner because it saves time. The other customer purchases the cleaner because it does the best job of cleaning and she has a child who is allergic to dust.

A salesperson must determine customers' needs and wants. Only then will he or she know how to best serve the customer most efficiently.

HOW DO THEIR WANTS AND NEEDS DIFFER?

Directions: On a separate sheet of paper, describe the differences between the needs and wants of the following pairs of people:

a. a person who is four and a person who is 24.

b. a high school graduate and a college graduate.

c. a single person and a married person.

d. a person who earns $12,000 a year and a person earning $50,000 a year.

e. a childless person and a parent of three children.

f. a person who lives in an apartment and a homeowner.

g. a student and a teacher.

h. a person who lives in Hawaii and a person who lives in Alaska.

THE SYSTEM OF SUPPLY AND DEMAND

The environment in which goods and services are sold is referred to as the ***market****. This market can be anywhere. It can vary in size and shape. Through today's technology, trade can be conducted in a business place, at home, by phone, and by computer. This "global marketplace" is accessible by the mere touch of a button. Within this system, prices are driven by two factors:* ***supply*** *and* ***demand****.*

Supply *refers to the quantity of goods and/or services which are being made available at various prices. These prices should repay the producer for the product or service. It should also give the producer a profit. As prices rise, producers will often produce more, expecting a larger profit. If prices fall, profits will be off and producers will probably lose money.*

As consumers begin to want or need particular goods or services, a ***demand*** *is created. Demand represents exactly how many or how much a consumer can or is willing to pay for goods or services. Basically, the greater the price of the good or service, the less the buyer will be willing to buy. However, should the prices fall, the consumer would be more likely to purchase a higher number of products.*

The prices of goods and services are determined by the quantity purchased by the consumer. If too much of an item is produced or the supply is not sold, a surplus may develop. A ***surplus*** *is a situation in which there exists too much of a good or a service. The surplus may be the result of over-production or it*

A101-A2 (Cont'd. on the next page)

may be the result of prices being higher than consumers are willing to pay. Regardless, the response to a surplus is usually a reduction, possibly in the form of a sale. When the price is lowered to the point where consumers buy up the surplus, an equilibrium develops. An **equilibrium** is reached when the supply and demand come together, or meet.

THE LAW OF SUPPLY AND DEMAND

As supply goes ⇧

demand and price go ⇩

As supply goes ⇩

demand and price go ⇧

A101-A2 (Concluded)

Economic Terminology

1. **Economics:** A social science concerned with using scarce resources to obtain the maximum satisfaction of the unlimited human wants of society.

2. **Scarcity:** A condition in which people's wants and needs are greater than the supply of things available.

3. **Goods:** Physical items which can be seen and touched (CD players, Gameboys, food, houses).

4. **Services:** Work done for pay not involving the production of a product (provided by people such as hairdressers, disc jockeys, lawyers, doctors).

5. **Wants:** Material things that humans desire for personal satisfaction (radios, televisions, cars, boats).

6. **Needs:** Those items that humans must possess for survival (shelter, food, clothing).

7. **Natural resources:** Those things provided by nature (land, water, timber, oil).

8. **Human resources:** Knowledge and skill of people (the most important resource).

9. **Factors of production:** Resources required to produce goods and services (natural resources, labor, capital, entrepreneurship).

10. **Labor:** The mental and physical abilities of humans to produce goods and services.

11. **Capital:** A man-made instrument used to produce other goods and services (robotics systems, tools, factories).

12. **Money:** Anything widely accepted by society in exchange for goods and services.

13. **Barter:** The direct exchange of goods or services.

14. **Market:** Buyers and sellers come together and freely agree on a price to exchange goods and services.

15. **Price:** The amount of money (or of other goods and services) paid and received for a good or service.

16. **Supply:** The quantity of goods or services available to be sold.

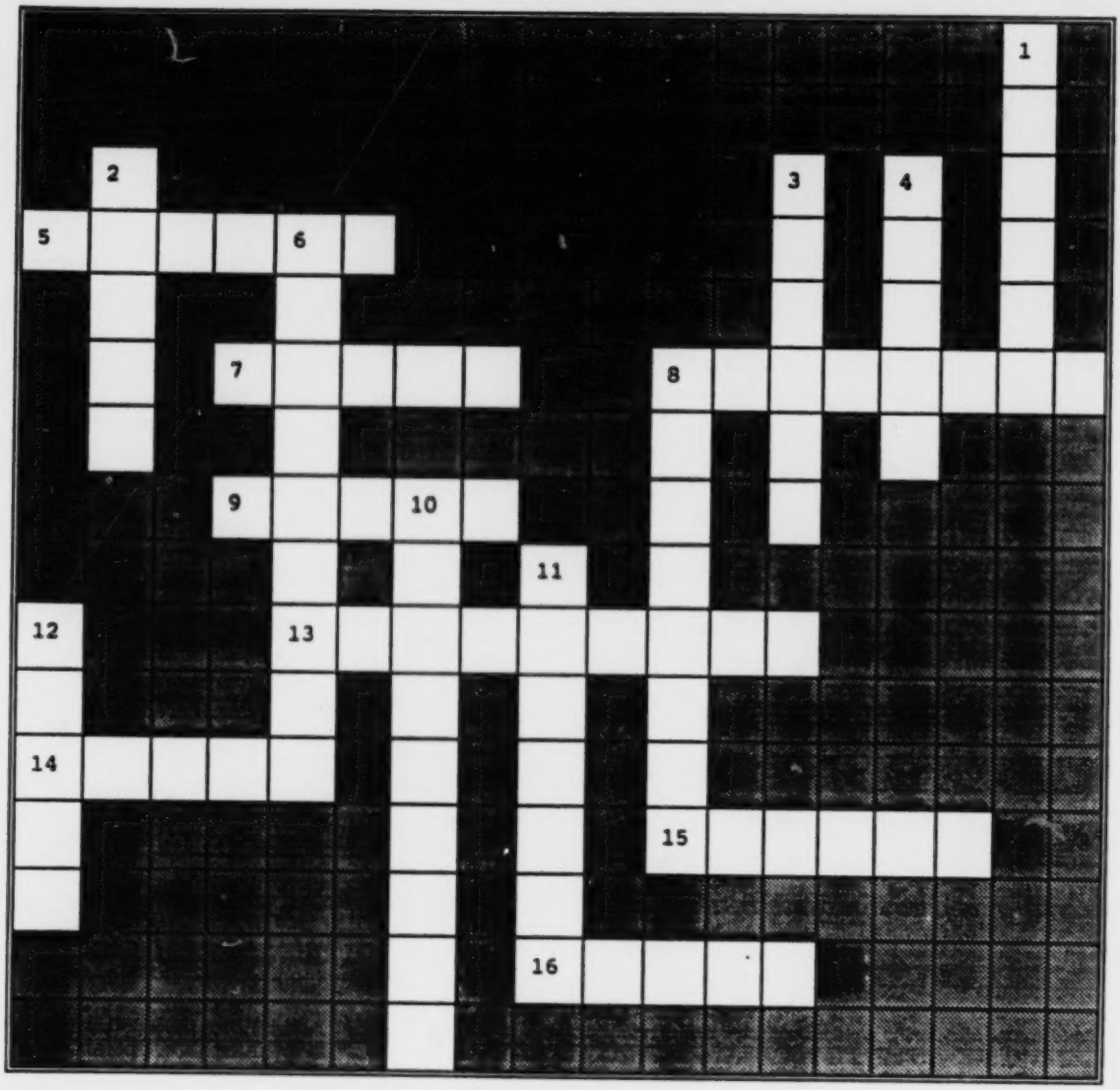
17. **Demand:** The quantity of goods or services consumers are willing to buy.

18. **Taxes:** Money consumers and businesses must pay to the government in order to be provided certain services by the government (such as highways, law enforcement, or social assistance).

19. **Inflation:** A period of time in which most prices rise. The result is that for the same dollar, you are able to buy less.

20. **Deflation:** A general drop in prices for most goods and services. The result is that the same dollar will buy more goods and services.

ECONOMICS CROSSWORD



(Clues are on the next page!)

A101-A4

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ECONOMICS CROSSWORD CLUES

ACROSS:

5. The process of exchanging goods and services for other goods and services (i.e., cloth for beef).

7. Americans use this to buy goods and services.

8. A condition when people's wants and needs are greater than the supply.

9. Physical items such as CD players, Gameboys, food, and houses.

13. A period of time in which prices rise and the dollar buys less.

14. Those items that humans must possess to survive (i.e., food, shelter, and clothing).

15. The total quantity of goods or services available for people to buy.

16. The mental and physical abilities of humans to produce goods and services.

DOWN:

1. A place where buyers and sellers meet to set prices for goods and services.

2. Money paid to the government by consumers and businesses.

3. The total quantity of goods or services that people want to buy.

4. The amount of money paid and received for a good or service.

6. A social science concerned with using scarce resources to obtain unlimited human wants.

8. Hairdressers provide this for their customers.

10. A period of time in which prices drop and the dollar buys more.

11. A good used to produce other goods and services.

12. Material things that humans desire (i.e., radios, TVs).

Complete the Economic Terms

Directions: **Complete the statements below by using the economic terms for this unit. One letter has been provided for you as a hint. You will use this letter in the final clue.**

1. The condition that results from people wanting and needing more than the available supply is called
   __ __ __ __ __ **i** __ __.
2. Items that can be seen or touched are called
   __ **o** __ __ __.
3. Hairdressers and lawyers provide
   __ __ __ __ __ __ __ **s.**
4. Food, shelter, and clothing are the basic **n** __ __ __ __ of human beings.
5. Resources required to produce goods and services are called
   __ __ **c** __ __ __ __ __
   __ __ __ __ __ __ __ __ __ __.
6. The mental and physical abilities of humans to produce goods and services are referred to as __ __ __ **o** __.
7. Robotics systems are **c** __ __ __ __ __ __.
8. Americans use coins and paper **m** __ __ __ __ as a means of exchange.
9. An economy which functions without the use of money may use the __ __ __ __ **e** __ system.

Using the bold letters that were provided for you, unscramble the letters to form a commonly used term in this unit.

__ __ __ __ __ __ __ __ __

In your own words, define the unscrambled term above:

Complete the Economic Terms
Answer Key

1. Scarcity
2. Goods
3. Services
4. Needs
5. Factor of production
6. Labor
7. Capital
8. Money
9. Barter

Answer to final completion statement: ECONOMICS

Answers to the last question will vary.

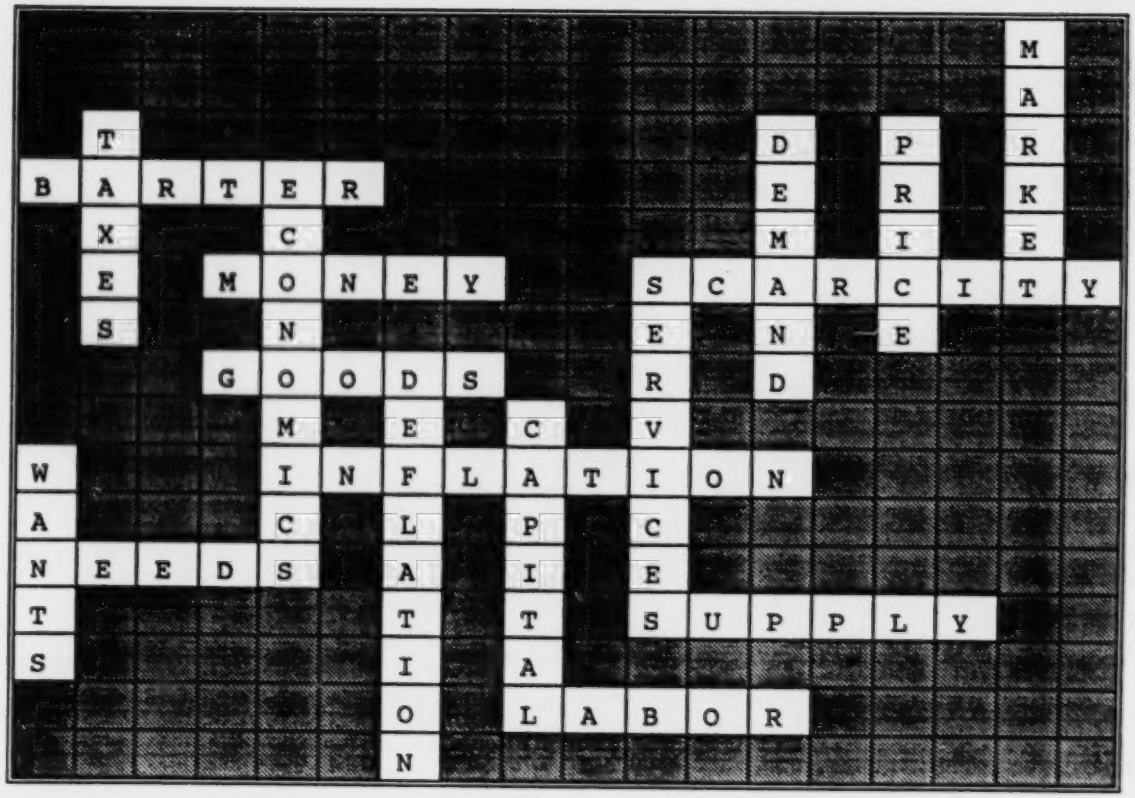
ANSWER KEY TO ECONOMICS CROSSWORD

ACROSS:

5. BARTER
7. MONEY
8. SCARCITY
9. GOODS
13. INFLATION
14. NEEDS
15. SUPPLY
16. LABOR

DOWN:

1. MARKET
2. TAXES
3. DEMAND
4. PRICE
6. ECONOMICS
8. SERVICES
10. DEFLATION
11. CAPITAL
12. WANTS



A101-TK2

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COURSE: Exploring Business & Marketing

UNIT: The World of Business

COMPETENCY: 1.00 Describe the characteristics of economic systems.

OBJECTIVE: 1.02 Describe the characteristics of other economic systems.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Discuss the differences in traditional, command, and mixed economic systems. 2. Prepare a chart with the three economic systems listed and compared. Display this chart in the classroom during the "World of Business" unit. 3. Allow students to go to the library and research a country of their choice. Use the globe or a world map for country selection. Assign a written report on the selected country indicating the type of economic system used in that country and the impact on its citizens. Have students type the reports into a word processor and the facts into a database. Printed reports can be displayed on an "Economic Systems" bulletin board in the proper category. 4. Have students draw a cartoon illustrating the role of government in one of the three types of economic systems.	Other Economic Systems (A102-A1)

OTHER ECONOMIC SYSTEMS

TRADITIONAL ECONOMY:

Description: *An economy in which people believe in doing things the way they always have been done. People in this type of economy believe that what as good for the past must still be good today!*

Examples: *Primitive tribes; the Amish people. Farming, dress, transportation, courtships, and jobs are modeled after their forefathers.*

Advantages: *Cooperation, personal satisfaction, and little friction due to few disputes about how to do things.*

Disadvantages: *No association with today's modern industrial world. Therefore, there is very little variety in goods and services.*

****

COMMAND ECONOMY

DESCRIPTION: *An economy that is run by a central authority. Government committees decide on what is produced, how it is to be produced, and the price of the product.*

EXAMPLES: *People's Republic of China, Cuba, the old Soviet Union.*

ADVANTAGES: *Since there is no room for free choice, there is no room for disagreements (at least, publicly).*

DISADVANTAGES: *Because the people have no rewards for efficiency or productivity, there is little incentive for profit. Therefore, the economy becomes very sluggish.*

****

MIXED ECONOMY

DESCRIPTION: *This system is a mixture of the traditional, command, and market systems.* ***No economic system is solely command, market, or traditional.***

ADVANTAGES: *By mixing the best of all types of systems, a nation is able to enjoy some government control, thus protecting the citizenry, promoting creativity and competition, and holding on to the traditional ideas and values that have proven effective.*

COURSE: Exploring Business & Marketing

UNIT: The World of Business

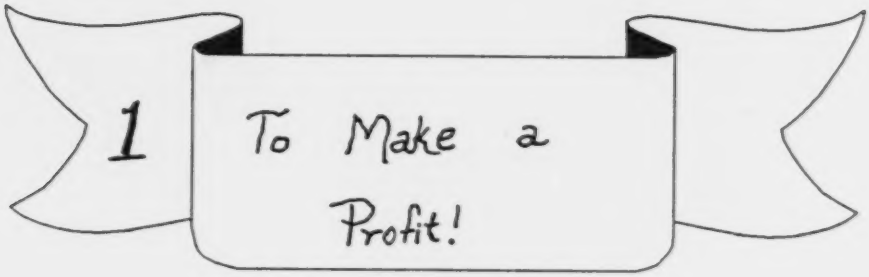
COMPETENCY: 2.00 Explain the nature of business and business career opportunities, including employment trends.

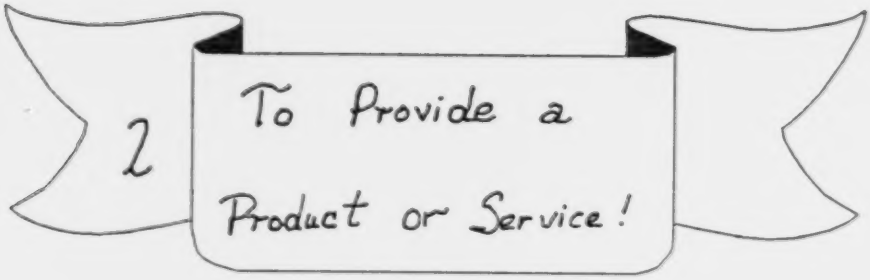
OBJECTIVE: 2.01 Discuss the purpose and activities of business.

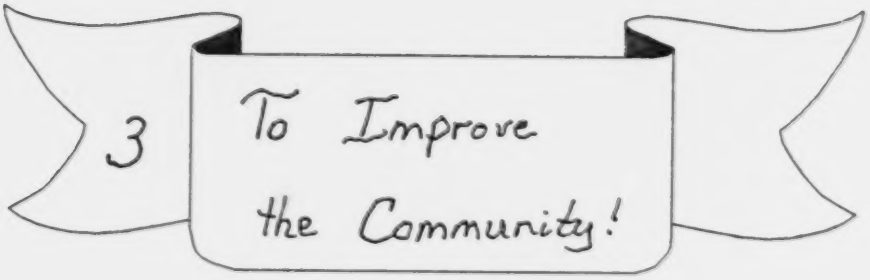
TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Discuss the purposes and the basic types of businesses, using the transparency, "The Reasons for Doing Business," and the handout, "Major Types of Business Ownership."	The Reasons for Doing Business (A201-T1) Major Types of Business Ownership (A201-A1)
2. Reinforce the concepts of supply and demand, profit and loss, and needs versus wants by having "Market Day." The instructions for Market Day are given in Teacher Instruction Sheet A201-TIS1. The activity may be repeated throughout the course, as it reinforces many of the concepts in other units as well.	Teacher Instructions for Market Day (A201-TIS1)

THE REASONS FOR DOING BUSINESS







A201-T1

MAJOR TYPES OF BUSINESS OWNERSHIP

SINGLE OR SOLE PROPRIETORSHIP

- *owned by one person*
- *approximately 77% of American companies are sole proprietorships*

- *owner does not have to share profits with anyone else, but must also assume all the risks*

PARTNERSHIP

- *consists of two or more persons sharing ownership*
- *approximately 8% of American companies are partnerships*

- *more capital available with which to operate the business*
- *shared risk means less chance for one partner to be totally wiped out financially*
- *partnership agreement usually constructed by a law professional*

THE CORPORATION

- *the most difficult of all business formats*
- *must be <u>chartered</u> by government*

- *is owned by a group of people known as shareholders*
- *additional taxes will be paid (both the corporation and the owners must pay taxes on the same profits)*
- *stockholders have very limited liability, therefore stand to lose less in the case of a corporate failure*

A201-A1 (Continued on the next page)

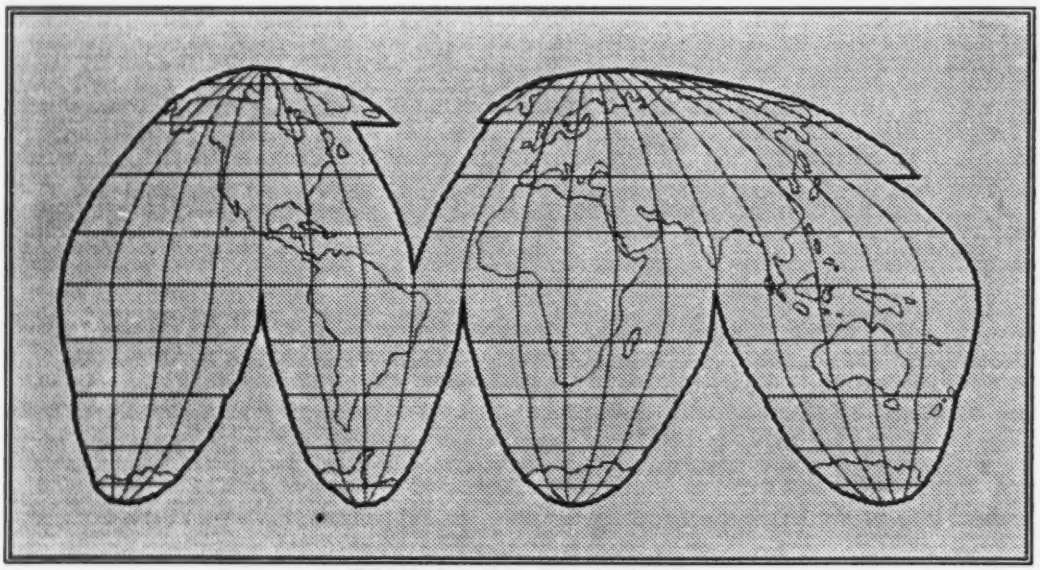
OTHER BUSINESS STRUCTURES

* *Cooperatives--owned by a group of people with common interests, such as state employees, farmers, etc.*

* *Authorities--government-owned businesses, such as the U. S. Postal Service or the Tennessee Valley Authority*

* *Franchises--may be owned by an individual but sells the products, services, or ideas of a parent company. Examples of a franchise are Dominos Pizza, McDonald's, and Golden Corral.*

***NOTE:** Businesses of most types may expand to as much as a global level after they have succeeded locally. They continue to expand as they produce at a level of quality that is acceptable to the public. In the units on management and small business/entrepreneurship, you will learn more about how to make a business succeed!*



FROM LOCAL TO GLOBAL
BY FOLLOWING YOUR BUSINESS PLAN!

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MARKET DAY

Market Day allows the student to learn the concepts of supply and demand, as well as profit and loss. The learner will see how competition affects the market. Each student will participate as a buyer and a seller and will work with a partner. When one partner is selling, the other is buying.

The teacher should divide the class with items that are needs and items that are wants. The items or services should already be marked with appropriate prices. Explain that the value reflects supply/demand needs. Monopoly money may be used for the students to purchase items. Everyone should be given the same amount of money (for example, $100) at the beginning of the exercise. Students purchase products or services, with purchases listed on pieces of paper. During the Market Day, students may reevaluate and reassign a value to products based on supply and demand.

Students should set up a "store" from which to market their products. The store should reflect their product's uses, reasons for purchasing the product, and the selling price. Students will be allowed to purchase and sell merchandise. At the end of the day, students should evaluate their business success/failure by doing a profit/loss statement.

Students should create a written analysis of what they bought (needs vs. wants), what they would do (if anything) differently, and what they would change about their sales techniques. Other questions to be considered are: Did anyone sell all their products before the students finished buying? Could they be smarter as a buyer? What different products should they have invested in?

Examples of Needs:	Examples of Wants:
clothing	recreational activities
food	entertainment
utilities	luxury items
housing	cleaning services

NOTE: As a variation of Market Day, hold a Barter Day by eliminating money and having students trade products and services for other products and services.

COURSE: Exploring Business & Marketing

UNIT: The World of Business

COMPETENCY: 2.00 Explain the nature of business and business career opportunities, including employment trends.

OBJECTIVE: 2.02 Explain the impact of technology on business activities.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Demonstrate the difference between a computer and a typewriter while performing a task such as inserting or moving a paragraph within a letter. Discuss time required to perform this task both ways and compare the labor cost. 2. Discuss the use, need, advantages, and disadvantages of an ATM in the banking industry. 3. Discuss how robotics have changed business and manufacturing. 4. Compare the use of computers in the library compared to the manual method of locating and checking out books. 5. Ask students to write a description of what they perceive their life will be like in the year 2015. They should include new technology items that will be present then and what technology present now will be obsolete by then. 6. Demonstrate and/or discuss the impact of the facsimile machine on today's business activities.	

COURSE: Exploring Business & Marketing

UNIT: The World of Business

COMPETENCY: 2.00 Explain the nature of business and business career opportunities, including employment trends.

OBJECTIVE: 2.03 Explain and show awareness of the ethical considerations and practices of business.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Define ethics and other terminology relating to business regulation and ethical practices.	Ethical Practices Terminology (A203-A1)
2. Discuss unethical practices in business and give examples.	Cases in Business Practice (A203-A2)
3. Have students look for newspaper and/or magazine articles demonstrating questionable ethics in business. Display the articles on a bulletin board.	
4. Have a member of the local Chamber of Commerce or Better Business Bureau talk to the class about ethics in business, the way to properly conduct business practices so as not to be considered questionable, and government protection for the consumer. **NOTE: Before having the guest speaker come in, brainstorm in small groups to come up with questions to ask the guest speaker. If possible, videotape the presentation for use at other times when a speaker is not available.**	

ETHICAL PRACTICES TERMINOLOGY

1. ***arbitration***--*allowing a third party to act as a judge in a disagreement between two parties. Both parties agree to let the third party's ruling be final.*

2. ***bait-and-switch advertising***--*an unethical business practice in which a store advertises a product for a low price to lure consumers into the store and then (through various methods) entices them to buy a more expensive product.*

3. ***bankruptcy***--*a legal process of avoiding paying bills by declaring the business to be unable to pay and allowing the courts to distribute whatever assets still remain among the many creditors that exist. **Note:** Although this is a legal action, it is frequently abused by unethical business people who will run up huge amounts of debts to the business while taking the money and property from the business and "hiding" it in other names, thus remaining personally wealthy while the creditors lose thousands of dollars each.*

4. ***computer crime***--*accessing and/or stealing information that is not intended for your use by breaking into and manipulating computer systems or programs. It may also involve the implanting of computer "viruses" or instructions that will cause programs or data to be destroyed. Other criminals use computer knowledge to falsify insurance claims, billing information, or health records. **The 1986 Computer Fraud and Abuse Act makes it a federal crime to access network databases, electronic bulletin board systems or electronic mail without authorization. This law includes "hackers" or programming enthusiasts who are "just messing around."***

5. ***cooling-off period***--*a specific period of time during which an individual may cancel a contract sold to him/her by a door-to-door salesperson.*

6. ***copyright***--*protection for authors or writers of books, songs, plays, movies, computer programs and systems designs, photographic collections, paintings, or other works of art. The protection extends throughout the lifetime of the creator of the work **plus** 50 years.*

7. ***credit***--*obtaining money, goods, or services at the present time while paying for these items in the future (usually in installments).*

8. ***deficit spending***--*a situation created by spending more money than the business is earning.*

9. ***Environmental Protection Agency (EPA)***--*a federal agency established to ensure that businesses are not polluting or endangering the planet. The EPA, with assistance from other groups, constantly looks for ways to clean up the environment and make existing businesses operate in a pollution-free fashion.*

10. ***ethics***--*the study of right and wrong behavior dealing with moral conduct, duty, and good judgment. It may involve professional rules concerning what is right or wrong, or it may simply be unwritten moral opinion of what is acceptable.*

11. ***Federal Trade Commission (FTC)***--*a federal agency created to make sure that fair competition is maintained. It can request any business to correct any unfair action and take action if the request is not granted.*

12. ***finance charge***--*the amount charged for purchasing goods on credit or borrowing money.*

A203-A1 (Continued on the next page)

ETHICAL PRACTICES TERMINOLOGY (Concluded)

13. ***generic product***--*a product that has no advertised brand name, has a plain label, and is supposed to be of the same quality as the brand name products it represents.*

14. ***injunction***--*a court order preventing certain actions. An injunction may be obtained preventing a business that participates in unethical practices from doing business in a region or state.*

15. ***monopoly***--*a company that sells almost all of a product, having eliminated competition. Monopolization of the market is illegal in our country.*

16. ***Occupational Safety and Health Administration (OSHA)***--*a government agency responsible for regulating the workplace so that a safe and healthy environment is maintained for workers even if it costs the company and consumers more money. OSHA has the power to close a company that does not fix health and safety violations within a reasonable period of time.*

17. ***password***--*an identification code assigned to a user that permits only that user and the system administrator to be able to view, use, or update computer records or programs.*

18. ***patent***--*a legal registration of a product or idea that prevents any person other than the inventor from using the product or idea design for 17 years.*

19. ***profit***--*the amount of money left after a business has paid all its bills and obligations.*

20. ***registered trademark***--*the brand, name, or symbol chosen by a company to represent its company or a product of the company that has been listed by the firm with the government and may not be used by any other individual or business. Some become so familiar that the type of product is called by the trademark name (for example, a Xerox machine).*

21. ***repossession***--*the act of taking back a product purchased on credit when the purchaser fails to pay the agreed-upon payments.*

22. ***social responsibility of business***--*includes providing jobs that give workers reasonable income for services performed, providing high quality goods and services wanted or needed by consumers, pay taxes to be used to improve the public services of the community, to influence the quality of life in the community by becoming active in community life (such as beautification, equipment for schools, funding the arts programs, providing scholarships, etc.).*

23. ***Sherman Antitrust Act***--*passed in the late nineteenth century in order to allow the federal government to break up large companies that were monopolizing a particular market.*

24. ***values***--*personal qualities and standards of behavior that a person values or thinks are important.*

25. ***white-collar crime***--*crime that is committed by clerical, professional, or business workers. It may or may not involve the use of technology but it does not involve the use of symbols of violence (such as guns) usually associated with street crime.*

CASES IS BUSINESS PRACTICE

Directions: *Read the following situations. After each situation, decide whether or not the practice was ethical or unethical. (Keep in mind that some practices may be legal without being ethical!) If you think the practice is unethical, write a solution to the problem that would bring the company in line with ethical practices or would provide a remedy legally to the injured party.*

SITUATION A:

The XYZ Corporation usually ships its merchandise by the Old Trucking Company or Local Shippers, Incorporated. Recently, a new trucking business named the New Shippers Company opened up in town. In order to build its business quickly, New Shippers has offered to ship for XYZ at a reduced rate. XYZ knows that this will enable them to lower their prices below their competition's prices and bring in more customers.

SITUATION B:

A rock singer, Charlie Goodtime, wrote a song, arranged it, and had it copyrighted. Several years later, another songwriter, Michael Rockme, copyrighted a different song under a different name. However, when it was released for the public, Charlie Goodtime and several others recognized portions of his music included within the second song.

SITUATION C:

A food processing company was having problems with employees using emergency exits to slip out and take unauthorized breaks and to slip out food to their cars to take home. In order to stop these practices, the company blocked the emergency exits and only allowed people to come in and leave through the main entrance.

SITUATION D:

A local furniture company regularly advertises big weekend sales with normally expensive items on sale for an unbelievably low price. However, when customers get to the store, they usually find that the store has "just sold out" of that item but has another similar item for "just a little bit more."

SITUATION E:

A tire company frequently advertises sets of tires available on credit without a credit check or credit references. Whenever a person gets a few days behind on payments, the company repossesses the tires without any leniency, grace period, or offering to work out the situation. The number of repossessions per month for this company compared to other companies in the area is considerably higher.

SITUATION F:

In order to save the company money when it installed its new computer system, Midwest Production Associates bought one copy of the computer programs that it needed and installed the programs on all thirty of the company's computers. The company owner knew about site licensing but felt that it was ridiculous to pay the extra fee when the system administrator knew how to save the company money.

SITUATION G:

The basketball coach, players, cheerleaders, referees, and scorekeepers are all allowed to get free drinks during the game. The coach frequently sends someone to get a drink for his wife and daughter, asking them to say that it is for a player.

COURSE: Exploring Business & Marketing

UNIT: The World of Business

COMPETENCY: 2.00 Explain the nature of business and business career opportunities, including employment trends.

OBJECTIVE: 2.04 Explain employment trends in business.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Using the handouts entitled "Fastest Growing Jobs in the US" and "Fastest Growing Jobs in NC," have students create a chart listing the jobs that are related to business and marketing in both categories. (Note: The handwritten chart generated in this activity can be used in Unit B as data to be entered into the computer to create a computer-generated chart.)	Fastest Growing Jobs in the US (A204-A1) Fastest Growing Jobs in NC (A204-A2)
2. Invite a person from the Employment Security Commission to speak to your class regarding non-traditional careers in business.	
3. Use materials from the N. C. State Occupational Information Coordinating Committee (SOICC) to create a job information center. The data collected through research in these materials may be utilized to build a computerized database for your classroom.	N. C. SOICC 1311 St. Mary's Street P. O. Box 27625 Raleigh, NC 27611

THE FASTEST GROWING JOBS IN THE UNITED STATES

OCCUPATIONAL TITLE	GROWTH OPENINGS PER YEAR
Computer Programmers	335,000
Computer Systems Analysts, Electronic Data Processing	251,000
Medical Assistants	119,000
Home Health Aides	111,000
Dental Assistants	88,000
Radiologic Technologists and Technicians	75,000
Paralegal Personnel	64,000
Data Processing Equipment Repairers	56,000
Dental Hygienists	54,000
Employment Interviewers (Private or Public Employment Services	54,000
Physical Therapists	53,000
Medical Records Technicians	30,000
Physical and Corrective Therapy Assistants and Aides	29,000
Peripheral Electronic Data Processing Equipment Operators	24,000
Operations and Systems Researchers	21,000
Optometrists	18,000
Data Entry Keyers and Composers	15,000
Occupational Therapists	15,000
Physician Assistants	15,000
Podiatrists	10,000

THE FASTEST GROWING JOBS IN NORTH CAROLINA

OCCUPATIONAL TITLE	GROWTH OPENINGS PER YEAR
General Managers and Top Executives	87,237
Secretaries	66,225
Farm Managers	31,802
Farm Workers	25,952
Supervisors, Clerical, and Administrative Support Occupations	25,689
Traffic, Shipping, and Receiving Clerks	22,193
Typists	18,207
Teacher Aides and Clerical Educational Assistants	11,583
Data Entry Keyers, exc. Composing	9,447
Construction Managers	7,941
Medical Secretaries	6,637
Reservation and Transportation Ticket Agents	6,370
Purchasing Managers	6,248
Legal Secretaries	5,809
Insurance Policy Processing Clerks	5,809
Typists, Word Processing Equipment	5,510
Stenographers	3,389
Personnel Clerks, exc., Payroll and Timekeeping	3,312
Postmasters and Mail Superintendents	1,076
Log Handling Equipment Operators	968

COURSE: Exploring Business & Marketing

UNIT: The World of Business

COMPETENCY: 2.00 Explain the nature of business and business career opportunities, including employment trends.

OBJECTIVE: 2.05 Explain leadership development in business.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Divide students into groups and ask them to write down the characteristics of a good leader. Have a leader from each group to share answer with the class. Compare answers with those on the transparency.	Characteristics of a Good Leader (A205-T1)
2. Have students list ways that a person can improve his/her leadership skills.	
3. Have students complete the "Leadership Development Worksheet."	Leadership Development Worksheet (A205-A1)
4. Discuss ways that belonging to a VSO can help develop leadership skills.	
5. Using the appropriate VSO handbook, have small groups of students complete the "VSO Scavenger Hunt" worksheet. (NOTE: You may modify this worksheet to your situation.)	Vocational Student Organization Scavenger Hunt (A205-A2)
6. Use the "FBLA Agenda for January" to demonstrate an agenda. Have students roleplay the "Example of a Meeting" to demonstrate how a meeting is conducted using correct parliamentary procedure, based on Roberts' Rules of Order.	FBLA Agenda for January/Example of a Meeting (A205-A3)

CHARACTERISTICS OF A GOOD LEADER

- A good leader is a good listener.
- A good leader is willing to work with a task until it is finished.
- A good leader is committed.
- A good leader is responsible.
- A good leader is dedicated.
- A good leader is trustworthy.
- A good leader assumes responsibility.
- A good leader delegates responsibility.
- A good leader delegates authority.
- A good leader knows what needs to be done and makes sure the task gets completed.
- A good leader is a good example to others.
- A good leader is energetic.
- A good leader is enthusiastic.
- A good leader has a good attitude.
- A good leader makes decisions wisely.
- A good leader has confidence in his/her own abilities.
- A good leader cares about others.
- A good leader ... (what else can you add to this list?)

LEADERSHIP DEVELOPMENT WORKSHEET

Part I: *Beside each of the letters of the word "leadership," list a characteristic of a good leader.*

L _____

E _____

A _____

D _____

E _____

R _____

S _____

H _____

I _____

P _____

Part II: *List ways that being involved in an organization at your school could help you further develop your personal leadership skills.*

SCAVENGER HUNT:

KNOW YOUR VOCATIONAL STUDENT ORGANIZATION!

Directions: *By listening to your teacher and/or using materials available in your classroom, find out the answers to the following questions concerning your vocational student organization. Your organization name may be substituted for CECNC.*

1. *What does CECNC stand for?*

2. *Into how many regions is the state of North Carolina divided for CECNC?*

3. *What are the official colors of CECNC?*

4. *How many goals are there in CECNC?*

5. *List one goal of CECNC.*

6. *What is the motto of CECNC?*

7. *In what region is your local chapter located?*

8. *List three competitive events.*

9. *How much are the dues for CECNC?*

10. *How can being active in CECNC help to improve your self-confidence and leadership skills?*

FBLA AGENDA FOR JANUARY

1. *Call the Meeting to Order*
2. *Reading of the Minutes*
3. *Treasurer's Report*
4. *Standing Committee Reports*
5. *Special Committee Reports*
6. *Unfinished Business*
7. *New Business*
8. *Program*
9. *Announcements*
10. *Adjournment*

EXAMPLE OF A MEETING

PRESIDENT: *I call this meeting to order. Will the secretary take the roll?*

SECRETARY: *(Calls out each member's name for a roll call.)*

PRESIDENT: *Will the secretary please read the minutes?*

MEMBER 1: *Madam President?*

PRESIDENT: *The chair recognizes Mr. Member.*

MEMBER 1: *I move that we dispense with the reading of the minutes.*

MEMBER 2: *I second the motion.*

PRESIDENT: *We have a motion and second that we dispense with the reading of the minutes. All in favor say "Yea." (Pause.) All oppose, "No." (Pause.) The "Yea's" have it and the minutes will be read at our next meeting. We will now have the treasurer's report.*

TREASURER: *The balance on hand is $350.69. (The treasurer then hands the president a copy of the Treasurer's Report to be filed for audit.)*

PRESIDENT: *Would the chairperson of the Social Committee please report?*

CHAIR: *Our next social will be at Independence Bowling Center next Saturday from 1:30 to 3:30. The cost for bowling two games and for the shoes will be $5.00.*

PRESIDENT: *We will now handle unfinished business. At our last meeting, the motion to donate $50 to the Business Department to buy a software package for the computer lab was laid on the table. Would someone like to act on this motion?*

MEMBER 3: *(After being recognized by the chair...) I move that the motion to donate $50 to the Business Department to buy a software package for the computer lab be removed from the table.*

MEMBER 4: *I second the motion.*

PRESIDENT: *It has been moved and seconded that we removed the motion from the table. All those in favor say "Yea." (Pause.) All those opposed say "No." The "Yea's" have it.*

MEMBER 3: *(After recognition from the chair...) I am in favor of donating $50 because the Business Department needs additional software.*

A205-A3 (Cont'd on the next page)

PRESIDENT: *Is there any further discussion? (Pause.) If not, we will proceed to vote. All those in favor say "Yea." (Pause.) All those opposed say "No." (Pause.) The "Yea's" have it. We will donate $50 to the Business Department to buy software for the computer lab.*

PRESIDENT: *We will continue with the agenda. The meeting is now open for new business.*

MEMBER 5: *(After receiving recognition from the chair...) I move that we participate in a school service project which will consist of collecting litter from the school grounds.*

MEMBER 6: *I second the motion.*

PRESIDENT: *It has been moved and seconded that we have a school service project of collecting litter on the school grounds. Is there any discussion?*

MEMBER 7: *(After receiving recognition from the chair...) I am in favor of this motion because we can make the school look more inviting by being free of trash. It will only take a little over an hour to clean up the grounds if everyone participates.*

MEMBER 8: *(After receiving recognition from the chair...) This project would benefit our school and provide our chapter with publicity.*

MEMBER 2: *(After receiving recognition from the chair...) I move to amend the motion by adding the words "on the third Thursday of this month after school" after the words "school grounds."*

MEMBER 4: *I second the motion.*

PRESIDENT: *It has been moved and seconded that the pending motion be amended to say that we have a school service project of collecting litter on the school grounds on the third Thursday of this month after school. Is there any discussion?*

MEMBER 9: *(After receiving recognition from the chair...) Meeting right after school is a good idea. Then we wouldn't have to come back to school on a Saturday to collect trash.*

PRESIDENT: *If there is no further discussion, we will proceed to vote on the amendment. All those in favor of the third Thursday of this month, say "Aye." All opposed, "No." With a majority vote favoring the amendment, the floor is now open for discussion on the amended motion.*

PRESIDENT: *With there being no further discussion, all those in favor of having a school project of collecting litter on the school grounds on the third Thursday of this month after school, say "Aye." All opposed, "No." With a majority vote, the amended motion passes. Is there any other business? (Pauses.) If not, are there any announcements?*

MEMBER 10: *(After receiving recognition from the chair...) Refreshments will be served in the Media Center after the meeting.*

MEMBER 3: *(After receiving recognition from the chair...) I move that we adjourn this meeting.*

MEMBER 4: *I second.*

PRESIDENT: *It has been moved and seconded that we adjourn this meeting. All those in favor say "Aye." (Pause.) Opposed, say "No." This meeting now stands adjourned.*

A205-A3 (Concluded)

Exploring Business and Marketing

Unit B:

Information Systems

COURSE: Exploring Business & Marketing

UNIT: Information Systems

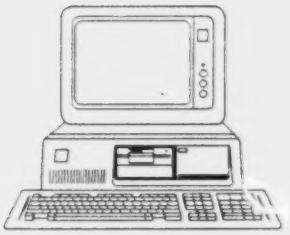
COMPETENCY: 3.00 Explain the functions of information systems in businesses.

OBJECTIVE: 3.01 Explain information systems.

TIME: 1 Class Period

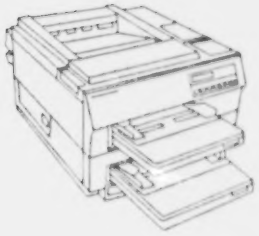
ACTIVITY	RESOURCES
1. Define "information systems." Clarify the differences between computerized and non-computerized information systems. Explain and give examples of commonly-used information system components in today's technological world.	What is an Information System Anyway? (B301-A1) The Components of an Information System Explained (B301-A1)
2. Define terminology used in information systems and data processing.	Computer Vocabulary List (B301-A2) Computer Crossword and Clues (B301-A3, B301-A3-Clues, and B301-TK1)

WHAT IS AN INFORMATION SYSTEM ANYWAY?



Everywhere we look in today's world, we see computers or computerized equipment. Our clocks, cars, stereos, VCRs, telephones, cash registers, banks, and offices, just to name a few things, all contain computerized equipment. Computers have totally changed the way we do everything. Therefore, it is extremely important that everyone become informed as to what computers can do and how to personally use information systems without having to rely on someone else.

When several elements begin to work together to help us use information (facts) more efficiently, we call this an **information system**. **Data** is another word for **facts**. Until facts have been processed in some manner, they are generally useless. Processing facts may involve operations such as adding, sorting, putting a report together, etc. Once the facts have been processed, they then become **information**. An **information system** is responsible for taking **data** and processing it quickly and efficiently into usable formats.



Because it is possible to process so much data in a short period of time using computer systems, a condition called **information overload** can occur. **Information overload** occurs when so much data is processed that much of the resulting information is as useless as the raw facts from which it was derived. The **information systems manager** is responsible for making sure that overload does not occur.

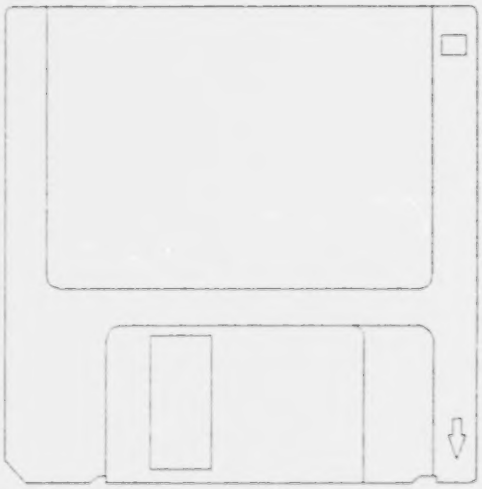
The responsibilities of the information systems manager depend on the size of the company. However, in all companies, certain basic responsibilities are performed. The information systems manager is responsible for planning the system that is needed for that company. Equipment must be selected. Decisions such as whether to connect the computers together into a network, whether to write the company's computer instructions (programs) or to buy pre-written software, and whether to have a separate information processing department or to place information processing equipment on every desk in the company.

B301-A1 (Continued on the next page)

People are the end users of a computer system. The system should be designed for the people who will use it. It should be as **user friendly** as possible. This means that the system is designed simply enough so that the users don't have to spend a great deal of time learning to use the system. If it is too complicated, workers will avoid learning to use the system. The **systems analyst** works with the information systems manager to put together the simplest, most efficient system possible for that company.

THE COMPONENTS OF AN INFORMATION SYSTEM EXPLAINED

The designers of the system must decide on what to purchase in several categories:



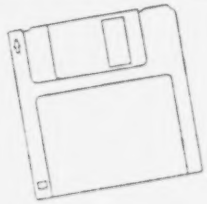
- **Hardware**--the equipment that must be purchased for the system. This includes cables, furniture, computers, modems, telephone systems, etc.
- **Application software**--computer programs designed to perform specific functions, such as calculating sales reports.
- **Systems software**--computer programs designed to run the actual computer when it is turned on.

Information systems are the center of efficient business. They have become part of every type of business in today's world. Designing and managing them is both challenging and rewarding.

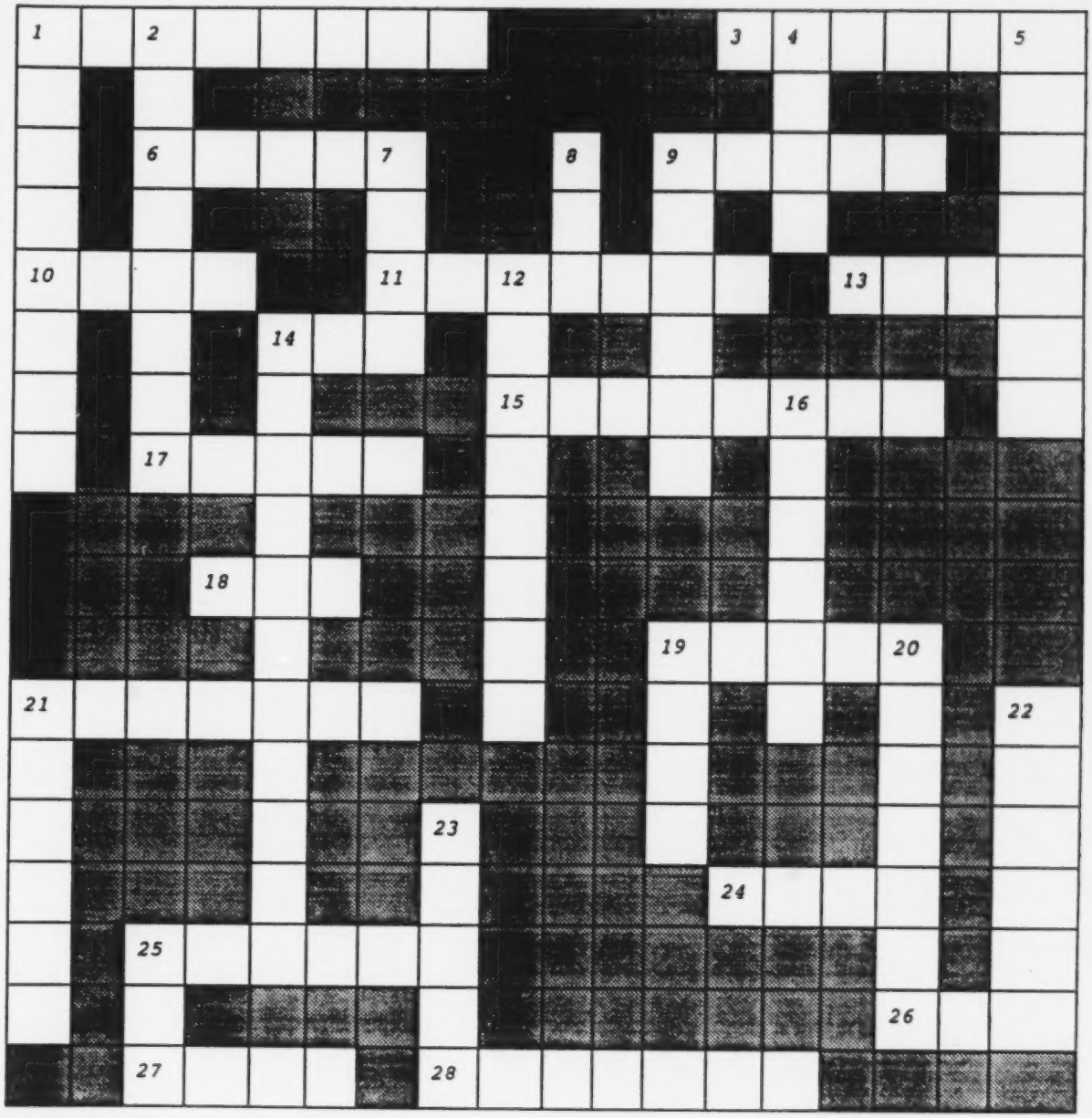
Learning to use an information system is necessary in order to have a rewarding career in today's world. There will be very few jobs that do not involve the use of computers by the time you graduate from high school. You must learn to master the use of an information system in order to be able to function in the world in which you live. The more familiar you are with information systems, the better your chances are for a really good career!

COMPUTER VOCABULARY LIST

1. abacus--one of the first computing instruments used by the Egyptians
2. arrow--the key on the computer keyboard used to move the cursor instead of the mouse
3. baud--the speed at which signals are sent from and received by the modem
4. boot--the process of starting up the computer
5. CAD--Computer Assisted Drafting
6. CD-ROM--Compact Disk-Read Only Memory
7. CPU--Central Processing Unit
8. calculation--the process of finding an answer by using a mathematical formula such as is done within a spreadsheet
9. center--to place in the middle
10. chip--another name for the integrated circuit
11. clip art--a collection of pictures that can be imported into documents or graphic illustrations
12. close--the process of putting away a file after using it
13. column--the vertical alignment of cells in a spreadsheet
14. computer--a machine used to process data accurately and quickly
15. cursor--a flickering spot of the computer screen that indicates the spot at which data is being input
16. cut--the word processing step that involves setting aside a group of words to be moved or "pasted" in another part of the document
17. database--an organized collection of information that can be manipulated by placing it in files, records, and fields
18. document--anything that is created using word processing
19. drag--a way to use the mouse to move an icon from one area to another
20. icon--a screen picture used to represent files or devices on the computer screen
21. insert--to put in
22. menu--a list of choices
23. modem--a machine used to translate computer (digital) signals into phone (analog) signals and then back into digital signals, this enabling two computers to communicate with each other
24. monitor--the video display part of the computer
25. network--a system that connects computer terminals by the usage of telecommunications
26. ROM--Read Only Memory
27. robotics--the construction, programming, and maintenance of robots
28. row--the horizontal alignment of cells in a spreadsheet
29. ruler--a status line that enables you to track where you are presently working within a computer program
30. scanner--a machine used to import photo images into the computer
31. sort--to arrange in a certain order, such as alphabetically
32. system--the overall group of hardware and software that make up the computing environment for a business
33. terminal--another name for a computer
34. windows--portions of the computer screen that contain their own documents



COMPUTER CROSSWORD



(Clues are on the next page)

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COMPUTER CROSSWORD CLUES

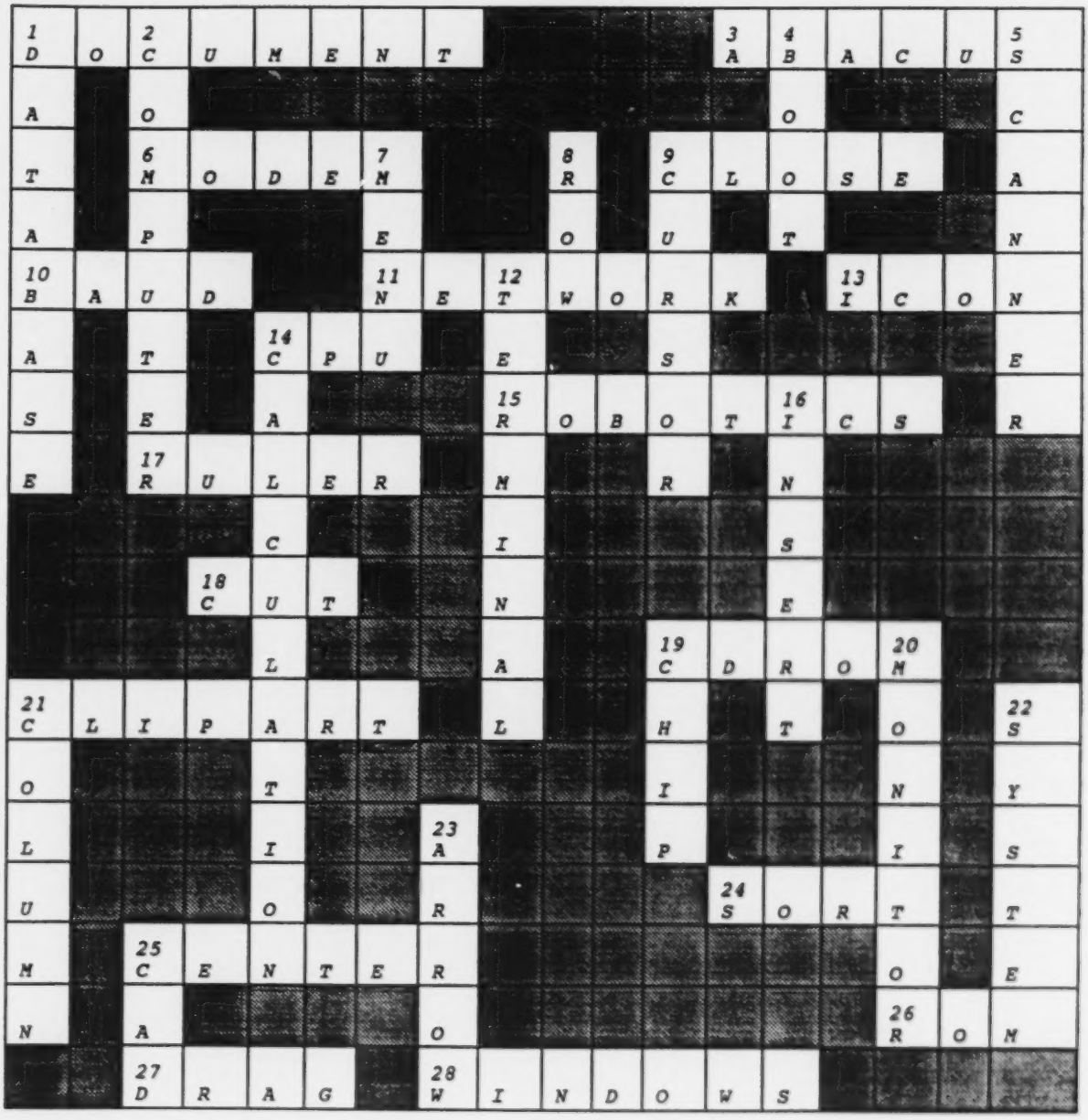
ACROSS:

1. *anything that is created using word processing*
3. *one of the first computing instruments used by the Egyptians*
6. *a machine used to translate computer (digital) signals into phone (analog) signals and the back into digital signals, this enabling two computers to communicate with each other*
9. *the process of putting away a file after using it*
10. *the speed at which signals are sent from and received by the modem*
11. *a system that connects computer terminals by the usage of telecommunications*
13. *a screen picture used to represent files or devices on the computer screen*
14. *Central Processing Unit*
15. *the construction, programming, and maintenance of robots*
17. *a status line that enables you to track where you are presently working within a computer program*
18. *the word processing step that involves setting aside a group of words to be moved or "pasted" in another part of the document*
19. *Compact Disk-Read Only Memory*
21. *a collection of pictures that can be imported into documents or graphic illustrations*
24. *to arrange in a certain order, such as alphabetically*
25. *to place in the middle*
26. *Read Only Memory*
27. *a way to use the mouse to move an icon from one area to another*
28. *portions of the computer screen that contain their own documents*

DOWN:

1. *an organized collection of information that can be manipulated by placing it in files, records, and fields*
2. *a machine used to process data accurately and quickly*
4. *the process of starting up the computer*
5. *a machine used to import photo images into the computer*
7. *a list of choices*
8. *the horizontal alignment of cells in a spreadsheet*
9. *a flickering spot of the computer screen that indicates the spot at which data is being input*
12. *another name for a computer*
14. *the process of finding an answer by using a mathematical formula such as is done within a spreadsheet*
16. *to put in*
19. *another name for the integrated circuit*
20. *the video display part of the computer*
21. *the vertical alignment of cells in a spreadsheet*
22. *the overall group of hardware and software that make up the computing environment for a business*
23. *the key on the computer keyboard used to move the cursor instead of the mouse*
25. *Computer Assisted Drafting*

COMPUTER CROSSWORD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B301-TK1

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COURSE: Exploring Business & Marketing

UNIT: Information Systems

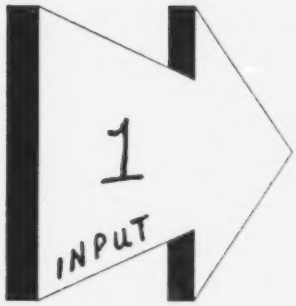
COMPETENCY: 3.00 Explain the functions of information systems in businesses.

OBJECTIVE: 3.02 Explain how information systems operate in business.

TIME: 2 Class Periods

ACTIVITY	RESOURCES
1. Define the IPOS Cycle and equate everyday activities to the cycle.	The IPOS Cycle (B302-T1) Everyday IPOS (B302-A1)
2. Define, discuss, and demonstrate the following information system applications:	Applications Software for the Modern Office--An Overview (B302-A2)
a. word processing and desktop publishing.	Word Processing and Desktop Publishing (B302-A2) Word Processing/Desktop Publishing Sample Document (B302-T2)
b. database.	Database Management (B302-A3) Database Sample Document (B302-T3)
c. spreadsheet.	Spreadsheets in Action (B302-A4) Spreadsheet Sample Document (B302-T4)
d. data communications.	Talk to Me!(B302-A5) Check Your Reading (B302-A6)
e. graphics.	Graphically Speaking (B302-A7) Graphics Sample Document (B302-T5)

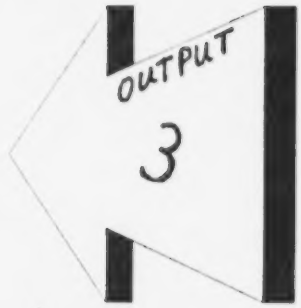
THE IPOS CYCLE OF DATA PROCESSING



INPUT OF DATA IS THE FIRST STEP IN THE IPOS CYCLE

PROCESSING OF DATA IS THE SECOND STEP IN THE IPOS CYCLE

STORAGE OF DATA IS THE FOURTH STEP IN THE IPOS CYCLE



OUTPUT OF DATA IS THE THIRD STEP IN THE IPOS CYCLE

EVERYDAY IPOS

Identify the IPOS steps (input, processing, output, and storage) in the following everyday tasks:

1. ***washing the dishes in a dishwasher***

   a. *input--*

   b. *processing--*

   c. *output--*

   d. *storage--*

2. ***making a peanut butter sandwich***

   a. *input--*

   b. *processing--*

   c. *output--*

   d. *storage--*

3. ***riding a bicycle***

   a. *input--*

   b. *processing--*

   c. *output--*

   d. *storage--*

4. ***typing a report on the computer***

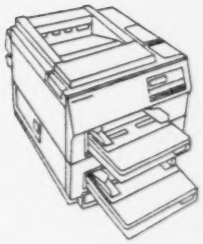
   a. *input--*

   b. *processing--*

   c. *output--*

   d. *storage--*

APPLICATIONS SOFTWARE FOR THE MODERN OFFICE-- AN OVERVIEW

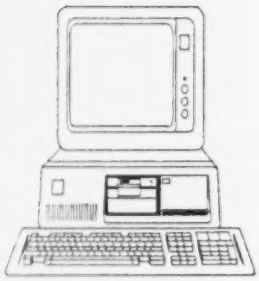


*Just what is **applications software**? Computer programs that are designed to help the user solve specific problems or do certain things are called applications software. There are several very popular types of applications software. All of these may be purchased by themselves. However, it is sometimes easier to buy a package of **interactive applications software** that can do all of the things described below from within one computer program.*

The following paragraphs describe the most popular applications software. Your teacher will show you samples of the output of the various kinds of software on the overhead projector as you discuss them in class.

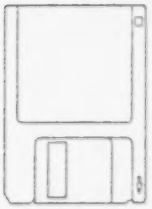
WORD PROCESSING AND DESKTOP PUBLISHING

*You have performed word processing all of your life. Every time you write something on a piece of paper, you are processing words. When you make a mistake, you use an eraser to make the correction. When you use a typewriter to produce your paper (or **document**), you are using machine-assisted word processing. If you make a typing mistake, you may use a typing eraser, white-out, or correction tape to fix the mistake. With both the pencil and the typewriter, you can usually tell where the correction was made no matter how carefully you make the correction. If you change your mind about some of the wording of the paper, in both cases you will have to start over again. If you want a picture included in the paper, you will have to draw one yourself or cut out one and paste it on the paper.*



*Computerized word processing and desktop publishing opens up a whole new world to you! If you type the same paper into the computer using a program such as WordPerfect or Clarisworks, you can make all the corrections on the screen, move words, sentences, and paragraphs around while importing pictures into the document to make it look like you want it to! **Using a word processor is like using a computer with built-in white-out and a little artist inside!***

SPECIAL NOTE:** **All the materials in this book were created on a word processor and printed on a laser printer! If the writers had used a typewriter instead, the quality would not have been nearly as good! The word processor could check for spelling mistakes, add in pictures, change type styles (fonts), and allow the writers to add to, take out, and rearrange materials without having to retype anything! How convenient!



*A **word processor** allows you to type in materials into the computer; insert, delete, move, and copy words, characters, and pictures; to change type styles, tabs, margins to change the look of the finished product; and to check spelling, word usage, and grammar at any point in time during the creation of the paper.*

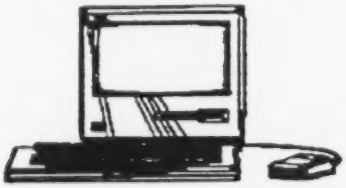
*Desktop publishing allows you to add in pictures, to move the material into columns, to change the size and style of the type to make headlines and captions, and to include materials from other software packages in your document. **Putting these two programs into one opens a whole new world of experimentation with and creation of unique and professional looks for your papers!***

Overview of Career Exploration Revision

EXPLORING CAREER DECISIONS

One Semester--Grades 6-8

- *Self-awareness*
- *Workplace awareness*
- *Career exploration*
- *Educational planning*



EXPLORING BIOTECHNOLOGY
One Semester: Grades 7 and 8

- *Biotechnology concepts and careers*
- *Environmental science uses and careers*
- *Agriscience concepts and careers*
- *Genetic engineering and careers*
- *Health services and careers*
- *Global environmental issues*
- *Leadership skills/decision making*

EXPLORING TECHNOLOGY SYSTEMS
One Semester: Grades 7 and 8

- *Introduction*
- *Problem Solving and Design*
- *Communication Systems*
- *Energy, power, and transportation systems*
- *Structural systems*
- *Manufacturing systems*

EXPLORING BUSINESS AND MARKETING
One Semester: Grades 7 and 8

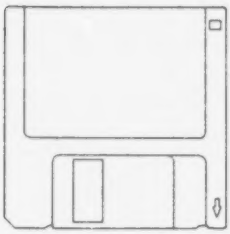
- The World of Business
- Information Systems
- Accounting and Finance
- Administrative Support
- Marketing
- Management
- Small Business/Entrepreneurship

EXPLORING LIFE SKILLS
One Semester: Grades 7 and 8

- Personal and social responsibility
- Fashion and appearance
- Resource management
- Nutrition and wellness
- Leadership and citizenship

DATABASE MANAGEMENT

A database is a method of organizing facts about people, places, or things. The database may be the names, addresses, phone numbers, and dates of birth of all the students in your class. All of the information is put into the database. It may then be used to create various reports, such as a list of all the birthdays in the class sorted by months of the year.



The letters, numbers, and symbols break the data down into the simplest form. These are called characters. When characters are put together, they are called fields. An example of a field is the name of the student. The total information about one person would be called a record.

The computer is capable of accessing records in a number of different ways. No matter how it accesses the records, it performs the task at a high rate of speed! This makes it cost effective for organizations of all types to purchase computerized database software in order to work more efficiently with the information that it has.

Smart, Jason

A FIELD

Smart, Jason 123 C Street, Anytown, NC 22222 *(999) 555-5555 June 3, 1980*

A FILE

Some of the common uses of databases include:

*Libraries: Information about the books, magazines, records, tapes, videos, etc. that are available at the library is kept in a computerized database. This is largely replacing the old **card catalog system** that has existed for years. Library users can quickly find out information using the database.*

Schools: Student records are entered into the database, allowing the school to quickly work with hundreds of students' data to produce attendance reports, grade reports, schedules, and other required information.

Health Care Providers: Patient records are kept in a database, allowing hospitals, doctors, insurance companies, and public health agencies to track patient histories, contagious diseases, costs, billing information, etc.

Businesses: Customer and product information is entered in databases, allowing the businesses to track the types of items sold, the types of customers to whom the items are sold, the methods of payment, credit collection information, etc.

HERE'S AN ETHICS CONCERN FOR YOU!

Companies have access to large amounts of information about people. In an effort to generate more income, many companies sell this information to other companies. Therefore, a customer who purchased jewelry from Mailorder Jewelers, Inc., may begin to get unwanted catalogs from dozens of other mailorder houses. A patient who complained of a backache but found that it was a temporary problem caused by some other problem may be denied insurance because the diagnosis was never entered into the database. At what point does information use end and information abuse begin? Should information exchange be regulated by the government?

B302-A3

DATABASE SAMPLE DOCUMENT

Name	Social Security Number	Date Employed	Date of Birth	Type of Coverage
J. Martin Durham	326-87-2818	4-3-87	7/15/56	Emp/Spouse
Daniel K. Enslow	204-56-8921	4-1-87	1/26/40	Emp/Spouse
Christina Jones	415-52-2941	4-2-87	11/13/30	Family
Elisa T. Ogden	217-52-2941	4-2-87	12/16/66	Emp Only
Simpson Weinberg	227-61-3847	4-3-87	3/12/65	Family
Kendra Cheney	332-34-5511	4-4-87	9/30/70	Emp Only
Larry Marvin	443-26-7890	4-4-87	5/21/35	Emp/Spouse
Kevin Monroe	561-26-7843	4-5-87	6/5/70	Emp Only
Gerry Dubin	664-36-7842	4-6-87	8/21/39	Emp/Spouse

SPREADSHEETS IN ACTION

*Any person who needs to organize and calculate mathematical figures (numbers) **has** to be excited about electronic spreadsheets!*

Spreadsheets have been used throughout history to perform calculations. Workers would enter figures into columns and add, subtract, multiply, and divide using mathematical formulas. Many times the answers that the worker came up with were not accurate because mistakes were made in the calculations.

*Spreadsheets are quite helpful in setting pricing policies, etc., by allowing the manager to ask **"What If?"** questions. "What if we changed the percentage of markup from 35¢ to 45¢? What if we could increase sales by 3¢ each quarter? What if sales increased by 4¢? 5¢? What if we could cut telephone costs by 1.5¢ by going with another phone company?"*

Recalculating the spreadsheet by hand to answer these "What If?" questions is a nightmare! Doing the recalculations using an electronic spreadsheet is a matter of a series of keystrokes and letting the computer do the rest of the work!

*Spreadsheets are laid out in **rows** and **columns**. The intersection of the **row** and **column** is called a **cell**. A **cell** can contain **text** (words) or **numbers**. **Formulas** can be put in to manipulate the **numerical data**. When the spreadsheet is viewed on the computer screen, in addition to the rows and columns of data, several other things can usually be noted:*

> *A **command line** which contains a **menu** of possible spreadsheet actions is usually displayed across the top or bottom of the spreadsheet. This makes the spreadsheet more **user friendly**, meaning that the user can see what to do while looking at the screen instead of having to go to the instruction manual for help.*
>
> *A **status line** tells the user what action is currently in use in the worksheet. The status line is most frequently located in the upper righthand corner.*
>
> *Some spreadsheets have a **data entry line** that allows the user to type the information and approve of it before it is actually moved into a cell. However, many spreadsheets allow the user to have **direct entry** into the cells without having to perform the extra step.*

*The screen may not hold all the data at one time. The computer's memory is much larger than what will fit on the screen. Therefore, you may have to use the **arrow keys** to **scroll** from left to right or up and down to see all the cells of the spreadsheet. **Just because you cannot see the information on a computer screen does not mean that it is not in memory!***

The actions that can be performed with a spreadsheet depends on the software. Your teacher will demonstrate to you what is available in your lab.

*Spreadsheets are useful in athletics, science, education (teachers call them **electronic gradebooks**!), income taxes and budgets, manufacturing, and marketing, just to name a few areas. **You may even find them useful in helping you with your math and science homework!***

SPREADSHEET SAMPLE DOCUMENT

Date Sold	#	Symbol	Price	Total Amount	Price 1/13/91	Market Value
3/13/91	400	BAC	19 1/4	$7,521.68	14 5/8	$5,850.00
3/13/91	400	XON	49	19,268.96	54 1/4	21,700.00
3/14/91	100	LOF	48	4,699.33	48 1/2	4,850.00
3/14/91	100	NSP	42 3/4	4,181.35	50 1/8	5,012.50
3/14/91	200	NSP	42 3/4	8,381.27	50 1/8	10,025.00
3/14/91	20	NSP	42 3/4	838.16	50 1/8	1,002.50
3/14/91	300	RJR	84 7/8	25,161.65	31 5/8	23,756.25
3/14/91	400	SN	63 1/4	24,910.65	60 3/8	24,150.00
3/14/91	70	STY	29 1/8	20,022.44	37	25,900.00
3/14/91	87	STY	29 1/8	2,499.56	37	3,219.00
3/14/91	300	WCP	31 5/8	9,295.74	38 1/2	11,550.00
3/15/91	200	SFX	27 3/4	5,550.00	32 1/2	5,500.00
3/15/91	108	SFX	26 3/4	2,889.00	32 1/2	3,510.00
			Totals	132,330.97		143,465.25

TALK TO ME! (OR SHOULD I SAY "TELECOMMUNICATE"?)

*One of the first things you ever did in your life was to communicate your feelings about being on planet earth to those around you! You did this, more than likely, by **screaming at the top of your lungs!** You were **communicating** your dissatisfaction with having to change from one environment to another under such stressful circumstances.*

*You have continued to communicate with others all of your life through one means or the other. You may be face-to-face with someone talking, you may be writing a note (**not in class, of course**), or you may be on the telephone (for no longer than 5 minutes at the time--**right?!**). There always seems to be something that you need to communicate with someone else.*

*Once you enter the "wonderful world of technology," you will find that things are not a lot different. As you sit at your computer working on a particular application, a question (to which you have no answer) will present itself. Where do you go for help? Do you (a) begin an endless search for the answers from stacks of magazines and/or manuals, (b) do you experiment for endless hours, (c) do you give up, or (d) **do you allow telecommunications to help you out of the jam you're in?** (Of course, the answer is D!)*

*There are a number of different types of **electronic communication.** The type with which we are most familiar is one person talking to another by way of a telephone. The basic technology of telephone transmission was discovered by Alexander Graham Bell, but it has been made much faster and more reliable by recent technological changes. The communications channels have progressed from a twisted pair of wires, a coaxial cable, and a microwave transmission, to optical fibers, which use laser technology and provides the possibility of more than 25,000 simultaneous (at the same time) transmissions! **Astronomical!***

The new technology allows for many different types of communication, provided all the pieces of the puzzle are in place. First of all, we must have a message, or data. Next, we need a common method of communication, or a procedure. We must have both hardware (equipment) and software (instructions). Lastly, and most important, we must have people who know how to use the equipment, software, and procedures. Check it out! We need:

- ☑ *SOMETHING TO COMMUNICATE (THE DATA)*
- ☑ *A METHOD FOR COMMUNICATING (THE PROCEDURE)*
- ☑ *THE EQUIPMENT WITH WHICH TO WORK (THE HARDWARE)*
- ☑ *THE PROPER EQUIPMENT INSTRUCTIONS (THE SOFTWARE)*
- ☑ *TRAINED COMPUTER PEOPLE (THE USERS)*

B302-A5 (Continued on the next page)

COMMUNICATIONS HARDWARE:

There are a number of different pieces of hardware that allow computers (and their users) to communicate with each other. One of the special devices that allows a telephone system and a computer system to work together is called a ***modem****. By installing special equipment in the computer (most now come modem-ready), the modem allows one computer to "call up" another computer and give it information at lightning speed. The more sophisticated the equipment you have purchased, the faster the computers can communicate with each other, thus lowering long-distance telephone fees. "Smart" modems have a directory of phone numbers (of other computers) to call, can answer the phone when other computers call, can check out passwords (so that unauthorized access to data does not occur), and act as a traffic cop to direct the flow of information.*

A ***multiplexer*** *is used in large organizations that have many computers needing to communicate with each other (or computers outside the company). The multiplexer may be described as a "very smart" multiple modem, handling the flow of data in and out of the computer system. In case the computer system is overloaded (tied up at the time), the sophisticated multiplexer (concentrator) can store the data and transmit it when the system is free.*

Another piece of equipment that allows people to communicate using new technology is the ***fax*** *for* ***facsimile*** *machine. This machine allows the transmission from one fax machine to another of written material, photos, drawings, computer printouts--anything that can be put on paper. With the proper equipment, the receiving fax machine can be "built into" the computer, allowing the user to receive and edit the material before printing it out.*

HOW COULD DATA COMMUNICATIONS BE USEFUL IN REAL LIFE?

- It could allow different departments within a hospital to communicate with each other by computer, saving time--and possibly lives!
- It could allow a credit card user to withdraw cash from a teller machine anywhere in the world, using a secret code and the magnetized credit card.
- It could allow you to play computer games with two or more players, none of which are at the same house.
- It could allow you to shop from computerized catalog networks without having to call and talk to an operator.
- It could allow you to exchange documents (from the word processor, spreadsheet, graphics designer, or database) with another computer in any location around the world.
- It could allow you to find out the latest sports scores, weather, news, stock market quotes, travel schedules, want ads, etc., through the use of the computer.
- It could allow you to do some of your work at home from your computer instead of having to drive to your job site.
- **HOLD THE PHONE! THE POSSIBILITIES ARE LIMITED ONLY BY OUR IMAGINATION! YOU MIGHT EVEN GET HELP WITH YOUR HOMEWORK!**

B302-A5 (CONTINUED)

NETWORKING COMPUTERS TOGETHER:

Through the use of a number of telecommunications devices, data can be transmitted to a network of computer users. The size of these networks can be from several computers in one room to several computers in different parts of the world. The equipment selected and the design of the network depends on the needs of the users.

*There are several network designs (known as **topologies**) that can be set up to allow computers to be networked together. The basic topologies are:*

- *BUS TOPOLOGY (NETWORK DESIGN)*
- *RING TOPOLOGY (NETWORK DESIGN)*
- *STAR TOPOLOGY (NETWORK DESIGN)*
- *HYBRID TOPOLOGY (LOCAL AREA NETWORK DESIGN)*

BUS TOPOLOGY:

*In bus topology, several pieces of computer equipment are connected with one single cable. One station, containing all the computer programs needed for the group, serves as the main computer (called a **file server**). Your school may very well be on a BUS network. Check with your teacher or technology coordinator to find out.*

RING TOPOLOGY:

Ring topology involves a group of terminals connected in a large circle. Data must be transmitted from one computer to another around the circle. Ideas, data, and research can be shared within the network as needed without having to be connected to a file server.

STAR TOPOLOGY:

Star topology requires a central computer system, known as the host computer. The individual terminals are connected in direct lines with the host, which coordinates the communication between these individual terminals.

HYBRID TOPOLOGIES:

*Many companies and educational groups create their own system by mixing together parts of all of the topologies given above. This allows them to set up the best type of topology for each section of the company and use their money and people most efficiently. These hybrids within a company are commonly referred to as a **LAN** or **Local Area Network**.*

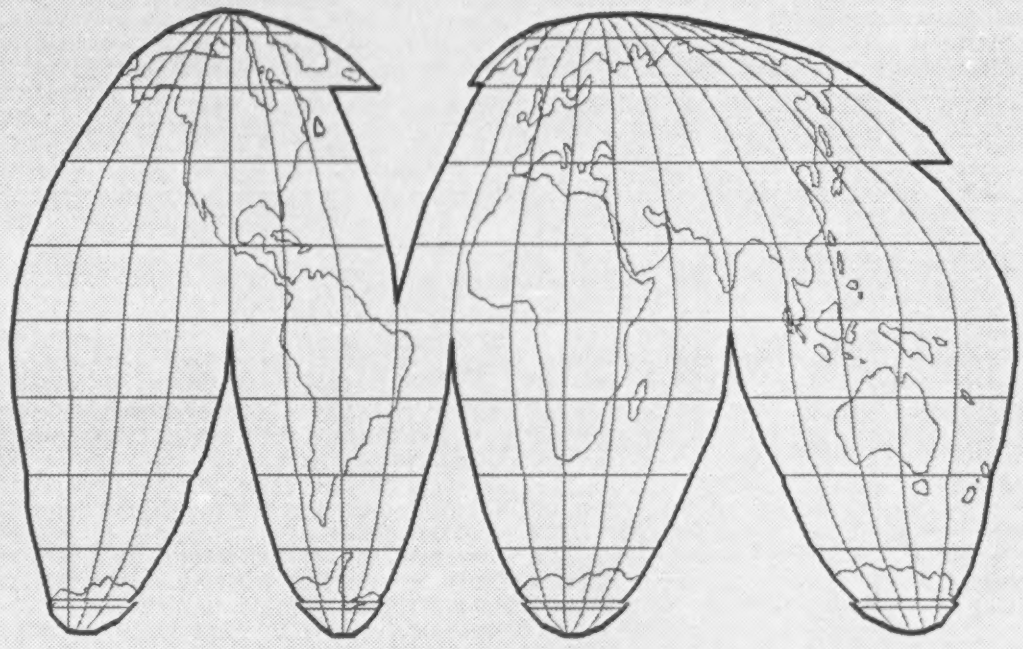
NETWORK APPLICATIONS:

***Bulletin Board Services:** In order to use networks most efficiently, it is necessary to have a knowledge of the applications programs available for networks. One of the most popular is the **electronic bulletin board system or BBS**. A BBS is used to exchange information, games, news, access online newspapers or encyclopedias, review films or books, investigate travel information such as airline schedules or restaurant information, exchange computer programming tips with other users, or even shop online with a department store!*

B302-A5 (Continued)

Electronic Mail Services: *Instead of writing a letter, putting it in an envelope, placing a stamp on it, and driving it to the post office, it is now possible to send the same types of messages through electronic mail or* ***E-mail.*** *You can send a message from your computer to another person's computer and the message will be stored in the receiver's "mailbox" until that person "picks up the mail!" The electronic mailboxes require a "key" or a password to "unlock" the mailbox. When the messages are received, the boxholder can erase the messages, print the messages, or answer the sender.*

There are many more sophisticated means of electronic data transmission used by people and organizations presently, and you can bet that the choices will grow with time! Concepts such as teleconferencing, telecommuting, electronic funds transfers, and paperless banking were to be in the future--but now they're "old hat" (something done everyday). Who knows what the technology future holds? One thing for sure--with good basic skills and the right technology education, you'll be prepared for anything!

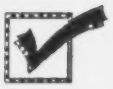


TECHNOLOGY HAS CHANGED THE WORLD FROM LOCAL TO A GLOBAL SOCIETY.

THE ENTIRE WORLD IS A COMMUNITY OF FRIENDS WITH WHOM WE CAN COMMUNICATE QUICKLY AND EASILY THROUGH SATELLITES, VOICE TRANSLATORS, E-MAIL, FAX MACHINES, ... THE LIST GOES ON AND ON!

BEST COPY AVAILABLE

CHECK YOUR READING!



1. *What was your first type of communication (probably)?*

2. *Starting with Alexander Graham Bell, list the four communication technology types.*

3. *What are the five things technological communications must have in place?*

4. *What is a modem?*

5. *What is a fax machine?*

6. *List the four types of LAN topologies.*

7. *What does a password do within the E-mail environment?*

GRAPHICALLY SPEAKING

One of the most popular types of applications software is the graphics package. This software is used to make (generate) drawings, pictures, charts, diagrams, bar graphs, etc. You have experienced computer graphics as you have played video games or watched animated TV commercials. There are many types of "fun" ways to use computer graphics. You may have used a simple program, such as Bannermania or Print Shop, to print banners, posters, or cards.

There are also many business needs for graphics applications. One of the most popular uses is called "presentation graphics." These are used in overhead transparencies, booklets, brochures, etc. They usually consist of line or bar graphs and pie charts. Business information having to do with sales patterns, on-the-job accidents, employee performance, product information, and other important data can be more easily understood when it is put in a picture format.

A major thing to remember when making a graphic presentation chart is to label the chart clearly! Otherwise, your beautiful work will be very hard to understand!

Most applications programs such as spreadsheets and databases have the ability to produce these charts and graphs from within the program. All you have to do is to put in the data you need, bring up the graphics option, and decide on the type of chart or graph you want!

Graphic presentations are important for a number of reasons, some of which are:

- *to clarify information,*
- *to simplify difficult information,*
- *to make presentations more interesting,*
- *to catch the attention of the audience,*
- *to reinforce important points,*
- *to summarize information,*
- *and to impress your business associates.*

B302-A7 (Continued on the next page)

We have discussed graphics for "fun" applications and graphics for business presentations. The possibilities of what can be done with graphics are endless! The graphics that you saw on the previous page--the butterfly and the magnifying glass--are what is known as ***"clip art."*** *The clip art can be purchased to go along with applications software such as WordPerfect. It is usually sold in thematic packages--holiday art, sports art, church art, school art, etc.*

Free-drawing graphics applications can be purchased for the creative artist. The mental concept behind this type of application is the same as an artist's canvas, palette, paints, and paintbrushes.

When the software is loaded into the computer, the screen comes up in a "tablet" format with the tools and palette being displayed as ***icons*** *or pictures. The* ***mouse*** *is used to* ***click and/or drag*** *the icons that the user needs. The* ***palette*** *allows you to select colors and patterns.*

The ***toolbox*** *allows you to choose the type and size of* ***paintbrush*** *that you wish to use, to select shapes to be used in the drawing, to* ***copy*** *an item from one place on the tablet to another, to* ***erase*** *unwanted items, or many other options.*

Once the user has created the drawing on the screen, the next step is to create the ***hard copy*** *or* ***printout.*** *Many of the less expensive graphics applications look really good on the screen, but when printed out on the printer lose some of their quality. Before purchasing graphics software, you want to make sure that the* ***output*** *is* ***WYSIWYG!***

W	**What**
Y	**You**
S	**See**
I	**Is**
W	**What**
Y	**You**
G	**Get!**

It is very important to realize that the output of your computer program is only as good as the software and the printer. If you want high-quality output, then you must invest in hardware that will complement your software program!

B302-A7 (Continued)

GRAPHICALLY SPEAKING (Concluded)

There are many other types of graphics uses. The computer graphics application simply makes it easier for ordinary people to do specialized art without having training. Some of the other graphics applications are:

- *Computer-Aided Design (CAD)--using the computer to draw and test a design plan rather than drawing it with pencil. Examples of CAD applications are house and/or building plans, bridge or highway designs, or automobile design.*

- *Weather Forecasting--using the computer to evaluate the current and/or projected temperatures, wind speeds, barometric pressures, etc., to create a model of what the meteorologist thinks is going to happen in the coming hours or days. These models are graphically illustrated on the weather forecast in every newscast.*

- *Athletics--using the computer to design plays, to analyze athletic workouts by using specialized scanners, and to display scores and stats on scoreboards.*

- *Computer Visualization--using math, graphics, and data combined to create a visualization in three-dimensional graphics of something that it would have been impossible for the user to have seen ordinarily. Possible uses for computer visualization include medical visualization of a surgical site or plastic surgery results, architectural visualization of how a room in a building will look, or a manufacturer's visualization of a finished product.*

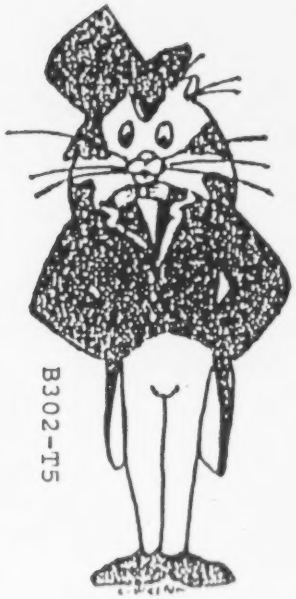
- *Virtual Reality--taking computer visualization a step further by allowing the user to simulate actually being in a situation by use of special headgear with cameras attached to the computer. Virtual reality allows the user to walk through a building mentally before it has ever been built.*

The possibilities of what can be done with computer graphics are limited on by the imagination, the equipment, and the software! It takes dedication to become efficient in using computer graphics, but it is a rewarding, addictive form of learning! New terms, such as resolution, pixels, bits per inch, pull-down menus, animation, bullets, etc., will quickly become a part of your everyday vocabulary as you work with computer graphics. Remember to start simply with a graphics package such as Print Power, Print Shop, Kid Pix, or Paint Brush; then graduate upwards into more sophisticated applications as you have access to them.

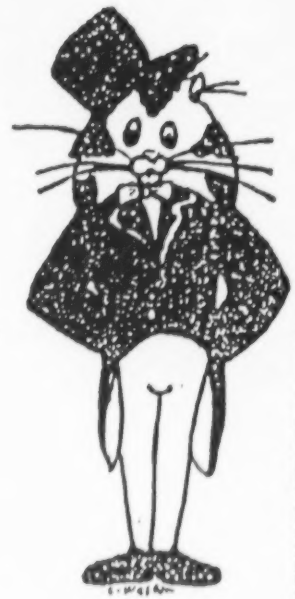
B302-A7 (Concluded)

WEST CRAVEN MIDDLE

JUNIOR BETA INDUCTION CEREMONY



B302-T5



GRAPHICS SAMPLE DOCUMENT

PLEASE COME

TUESDAY, MARCH 16 AT 7:00

W.C.M.S. GYMNASIUM

SPECIAL EFFECTS ACHIEVED BY MODIFICATION OF THE SAME GRAPHIC

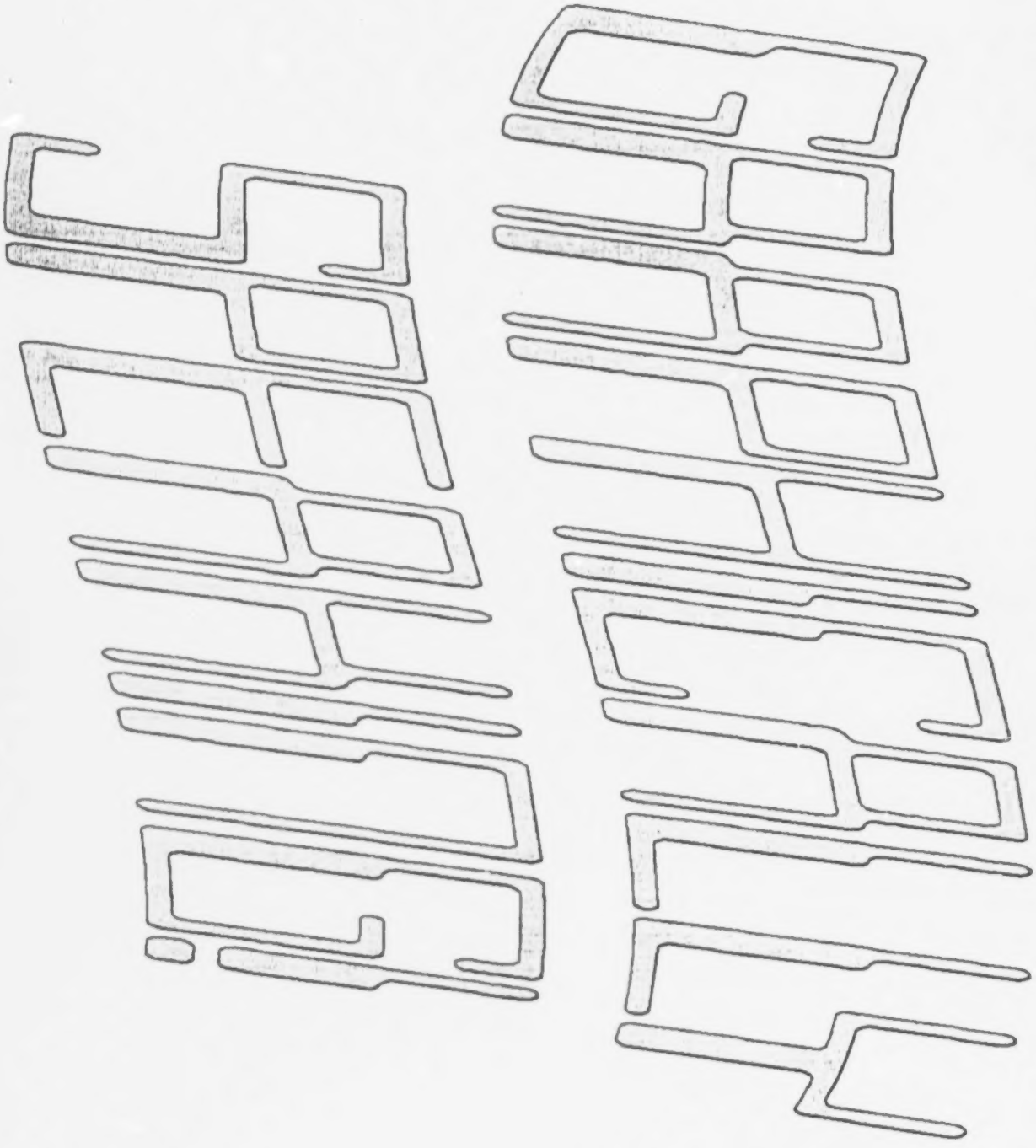
GRAPHICALLY SPEAKING!

B302-T6

SPECIAL EFFECTS ACHIEVED BY MODIFICATION OF THE SAME GRAPHIC

B302-T6

SPECIAL EFFECTS ACHIEVED BY MODIFICATION OF THE SAME GRAPHIC



COURSE: Exploring Business & Marketing

UNIT: Information Systems

COMPETENCY: 4.00 Evaluate personal interests and aptitudes in pursuing a career in information systems and simulate related activities.

OBJECTIVE: 4.01 Investigate the current career opportunities in information systems.

TIME: 2 Class Periods

ACTIVITY	RESOURCES
1. Investigate opportunities requiring knowledge of information systems by completing the activities that accompany the handout, "Help Wanted! Business/Computer Skills Needed!"	Help Wanted! Business/Computer Skills Needed! (B401-A1 and B401-TK1)
2. Using a resource such as the Occupational Outlook Handbook, investigate three careers related to information systems. Suggested career titles might be computer programmer, systems analyst, or computer salesperson, but the actual titles will vary from resource to resource. Use the form entitled "Career InfoSearch" to record the answers.	Career InfoSearch (B401-A2)

HELP WANTED! BUSINESS/COMPUTER SKILLS NEEDED!

Rumor has it that there are no jobs out there, but we would like to set that rumor straight right now! <u>There are no good jobs out there for unskilled, undedicated people!</u> However, the examination of only one day's HELP WANTED ads in a medium-sized town newspaper proves that on any given day with business skills and computer knowledge, jobs can be found in almost any interest area thinkable! Take a look!

<u>COMPTROLLER</u>. Bookkeeping and payroll experience needed. Full time with benefits. Apply in person, Holiday Inn. No phone calls.

<u>RECEPTIONIST</u>. Position Available. Experience with animals needed. Submit resume to Lahorn Animal Clinic, 1233 Memorial Drive, Greenville, 27834.

<u>MEDICAL TRANSCRIPTIONIST</u>. Needed for ophthalmology practice. Must have experience and possess good written communication skills. Competitive salary and benefits. Send resume to Personnel, 432 Bowman Gray Drive, Greenville, 27834.

<u>MEDICAL RECORDS SECRETARY</u>. Needed for LTC facility. Transcription and typing required. Organizational skills and knowledge of medical terminology a must! Familiarity with LTC requirements and/or experience in a long-term care facility a plus. M-F 9-5. Excellent salary and benefits. To schedule an interview call Susan Margaret (919) 946-1370. EOE.

<u>PAYROLL/ACCOUNTS PAYABLE AND RECEIVABLE CLERK</u>. Needed for doctor's office. Full time. Excellent benefit package. Experience preferred. Apply in person at Building 70, Doctor's Park. No phone calls please!

<u>RECEPTIONIST</u>. Expert phone skills. Also typing, filing and computer skills. Apply in person, Eye Care Center, 600 North Atlantic Avenue.

<u>ACCOUNTANT</u>. Needed for local textile company. Must have experience in all phases of accounting, including payroll, accounts receivable, accounts payable, reconciliations, quarterly and year-end reporting. Send resume to Controller, P. O. Box 55555, Rocky Mount, NC 27804.

B401-A1 (Continued on the next page)

CAD OPERATOR. An Eastern North Carolina company is seeking a CAD Operator to work in the Manufacturing Engineering Department. Must have working knowledge of AUTOCAD 10 and 11, A.M.E./3.0, Auto-manager, Microsoft Works, Windows 3.1, and DOS 5.0 and be able to produce mechanical drawings. Must have a high mechanical aptitude with some background in machine shop and/or industrial mechanics. Please send resume to: Emperor Brush Company, P. O. Box 77777, Greenville, NC 27834. An EOE.

EXPERIENCED SALESPERSON. Full time. Commission plus bonuses. Call 753-5555.

COMPUTER OPERATOR. To be in charge of a multiport, multiuser computer system. Must be experienced and have knowledge of computer operation procedures and have a working knowledge of accounting. Must be able to take charge and get things accomplished in a timely manner. Send resume along with salary history to Manager, P. O. Box 686868, Greenville, NC 27835.

Directions: *Complete the following tasks using the want ads listed above.*

1. Identify how computer knowledge could be used in each advertised job. (For example, an experienced salesperson would find it useful to put customer information in a database.) List each job separately. Use complete sentences when writing your answers.

2. Define the following terms in your own words. You may use any resources available to you (including your teacher!).

   a. comptroller
   b. ophthalmology
   c. LTC facility
   d. transcription
   e. resume
   f. EOE
   g. CAD
   h. accounts payable
   i. accounts receivable
   j. multiuser system

Help Wanted Teacher's Key

NOTE: Answers for both this and B401-A2 will vary according to the resources available in your classroom setting. Given below are some guideline possibilities of what the answers might be. Since VOCATS test questions will be written from these guideline suggestions, be sure to emphasize these possible answers when going over the activities in class.

Directions: ***Complete the following tasks using the want ads listed above.***

1. Identify how computer knowledge could be used in each advertised job. (For example, an experienced salesperson would find it useful to put customer information in a database.) List each job separately. Use complete sentences when writing your answers.

   A **motel comptroller** would use an integrated information system for accounts receivable, accounts payable, payroll, correspondence, banking statements, inventory control, etc.

   A **animal clinic receptionist** would use an information system to maintain customer records in a database and to maintain payment records in an accounting program. Usually the accounting program would be customized for the individual type of business.

   A **medical transcriptionist** would use the word processor to maintain patient records. The patient information would be accessed from a database.

   A **medical records secretary** would use an integrated information system to update patient charts on a daily basis, to maintain patient care and financial records, to track medication, and other incidental functions.

   A **payroll/accounts payable and receivable clerk** would use a customized accounting package to maintain both employee and customer records.

   An **eye clinic receptionist** would maintain appointment records, prescription records, payment records, and inventory records on an integrated information system.

   An **accountant** would use an integrated information system to maintain company financial records relating to all phases of the business.

A **CAD Operator** would use the CAD system to design products and would use an integrated information system (Microsoft Works, in this case) to write product specifications, maintain materials inventories, project product pricing, etc.

A **computer operator** would not only use an integrated information system for various functions, but would be responsible for knowing the system configuration (setup), being able to troubleshoot problems, and provide guidance for the user group.

2. Define the following terms in your own words. You may use any resources available to you (including your teacher!).

   a. comptroller--an employee responsible for expenses and accounts for the company.

   b. ophthalmology--the scientific study dealing with the functions, structure, and disease of the eye.

   c. LTC facility--long-term care facility (nursing home)

   d. transcription--typing notes that have been dictated either in person or through use of a taping device.

   e. resume--a biographical summary of a person's education, professional career, and personal talents.

   f. EOE--Equal Opportunity Employer

   g. CAD--Computer-Assisted Design (using the computer to draw and test a design plan rather than drawing it with pencil).

   h. accounts payable--the financial record of what the company owes to creditors.

   i. accounts receivable--the financial record of what is owed to the company by customers.

   j. multiuser system--a computer system in which two or more computers are networked together.

Career InfoSearch

1. What is the name of the occupation on which you are doing research?

2. List at least three duties of a person employed in this occupation.

   a.

   b.

   c.

   d.

3. List at least three personal characteristics needed for this occupation.

   a.

   b.

   c.

4. What is the highest educational level required for this occupation?

5. What is the salary range for this occupation?

6. What three high school courses would be helpful in preparing for a career in this occupation?

7. What is the employment outlook for this occupation?

8. What are two related occupations?

COURSE: Exploring Business & Marketing

UNIT: Information Systems

COMPETENCY: 4.00 Evaluate personal interests and aptitudes in pursuing a career in information systems and simulate related activities.

OBJECTIVE: 4.02 Assess the education, experience and other requirements for a career in information systems.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Use the handout, "Tree of Knowledge," to assess the education, experience, and other requirements for management occupations. 2. Assign interviews or research tasks to several students. The students should contact local businesses and talk with the personnel directors. Determine all requirements for the three levels of management within that organization. Report the findings to the class. 3. Ask the personnel director of a local business to act as a guest speaker for your class. Present a program about his/her company and discuss requirements for management. Finish with a question-and-answer session. (Consider video taping the presentation for use with future classes.)	Tree of Knowledge (See Appendix)

COURSE: Exploring Business & Marketing

UNIT: Information Systems

COMPETENCY: 4.00 Evaluate personal interests and aptitudes in pursuing a career in information systems and simulate related activities.

OBJECTIVE: 4.03 Simulate activities performed by information systems personnel.

TIME: 5 Class Periods

ACTIVITY	RESOURCES
1. Before beginning the activities below, you will need to give specific instructions or create wall charts explaining how to perform simple word processing, database, spreadsheet, and graphics operations with the software you have available in your classroom. Although these instructions will take up some of your class time, they will be needed throughout the semester for various functions.	Teacher Directed Instruction Software Instruction Manuals
2. Have students create a memo using the word processor.	Word Processing in Action (B403-A1)
3. Have students create a schedule using the tables function of the word processor. (NOTE: Depending on your software, the table lines may not be exactly as they are in the example. This will be true of many activities.)	Word Processing in Action (B403-A2)
4. Have students enter and manipulate customer information in a database.	Database Activity (B403-A3)
5. Have students enter product data in a spreadsheet.	Spreadsheet Activity (B403-A4)
6. Have students create a poster using graphics software.	Graphics Activity (B403-A5)

WORD PROCESSING IN ACTION

DIRECTIONS: Using the word processing program available in your room, key in the following activities, proofreading them carefully before printing them out. ***Remember to save those trees by getting it correct on the screen before using the printer <u>every time</u>!***

INTEROFFICE MEMORANDUM

TO: All Office Personnel

FROM: Ms. Susan Smithwick

DATE: November 3, ----

SUBJECT: Word Processing Training Session

It has come to my attention that many of you who are currently using the word processor have not discovered many of the features available to you. Therefore, the productivity level of the office is not as high as it could be. Also, the quality of our output is diminished when our documents are not properly prepared. As a result, we have hired an independent trainer to come into our word processing center to conduct a mini-course in word processing.

Some of the features presently not being consistently used include **wordwrap, centering, tab setting, indents and hanging indents, font changes, columns, tables, and table math.** These are features that lend an air of professionalism to the documents we produce. It is absolutely necessary that we use these and other features consistently.

The sessions will start next Monday and will go through Friday. The total length of time for each person will be 20 hours. In order to keep our company operating as efficiently as possible during this period of time, a staggered training schedule has been devised. Please refer to the attached schedule to find out when you will be in the center for training.

At the end of your training session, you will be given a final exam. A minimum score of 90 must be achieved in order for you to maintain your present position in the company. Any person scoring below 90 will have a salary reduction to the next level until that person satisfactorily passes a similar exam. It is to your advantage financially to attend all sessions and participate in all activities!

If you have any questions, please call me at Extension 549.

WORD PROCESSING IN ACTION

DIRECTIONS: Key in the following schedule to be sent out with the memorandum. Proofread carefully before printing.

EMPLOYEE NAME	TIME	STATION #
Charles Watson	8:00 - 12:00	A
Meredith Branch	8:00 - 12:00	B
Niecy Brown	8:00 - 12:00	C
Steven Alfordson	8:00 - 12:00	D
Maria Gonzalez	8:00 - 12:00	E
Muhammed Ahad	1:00 - 5:00	A
Elizabeth Huggins	1:00 - 5:00	B
Shameka Wallace	1:00 - 5:00	C
Wayne Gurganus	1:00 - 5:00	D
Ashley Peterson	1:00 - 5:00	E

DATABASE ACTIVITY

DIRECTIONS: Using the database program available in your room, key in the following customer information. Print the list as it appears below. Then sort the list according to ZIP Codes and reprint it. Proofread carefully before printing.

NAME	STREET ADDRESS	CITY	STATE	ZIP	PHONE #
Sharese Anderson	1400 South Street	Albritton	KY	56734	700-555-5432
Mary Beth Carsun	P. O. Box 3244	Smithfield	WY	38976	456-987-3456
Fu Ming Chung	302 S. Wilson St.	Wrights	TX	85301	915-492-7352
Sidney Ellis	409 S. York Street	Breyville	AK	08527	730-261-6583
Rodney Garris	392 Old Towne Villa	Jonestown	FL	13476	423-553-3472
Jerraine Hamm	Rt. 2, Box 542	Lankston	AR	84630	398-740-4924
Cherry Jones	P. O. Box 12	Smallwood	PA	89340	382-840-1830
Nancy Leake	Route 1	Tysonville	MD	97302	372-849-3872
John Macon	West Arms, Apt. 3	Mercer	VA	27384	392-840-8789
Porscha Perry	4322 Mayberry Rd.	Oak City	WV	63194	939-382-7730

SPREADSHEET ACTIVITY

DIRECTIONS: Using the spreadsheet program available in your room, key in the following product information. Use formulas to calculate totals. Proofread carefully before printing.

STOCK #	JAN. SALES	FEB. SALES	MARCH SALES	APRIL SALES	MAY SALES	JUNE SALES	PERIOD TOTAL
A-4563	3251	4532	1467	8473	3927	4927	
A-8201	1123	1054	1865	2023	1392	1787	
A-9853	4356	6543	3578	4961	6832	6732	
C-5119	3871	3753	3096	3865	4112	4021	
C-6328	7654	5675	5061	5743	6854	7341	
C-7432	2083	2267	1876	2684	2943	2742	
G-3450	3498	3671	3194	3308	3987	3885	
G-3451	2456	1865	1643	1954	2197	2063	
TOTAL SALES							

SPREADSHEET ACTIVITY

DIRECTIONS: Using the spreadsheet program available in your room, key in the following product information. Use formulas to calculate totals. Proofread carefully before printing.

STOCK #	JAN. SALES	FEB. SALES	MARCH SALES	APRIL SALES	MAY SALES	JUNE SALES	PERIOD TOTAL
A-4563	3,251	4,532	1,467	8,473	3,927	4,927	26,577
A-8201	1,123	1,054	1,865	2,023	1,392	1,787	9,244
A-9853	4,356	6,543	3,578	4,961	6,832	6,732	33,002
C-5119	3,871	3,753	3,096	3,865	4,112	4,021	22,718
C-6328	7,654	5,675	5,061	5,743	6,854	7,341	38,328
C-7432	2,083	2,267	1,876	2,684	2,943	2,742	14,595
G-3450	3,498	3,671	3,194	3,308	3,987	3,885	21,543
G-3451	2,456	1,865	1,643	1,954	2,197	2,063	12,178
TOTAL SALES	28,292	29,360	21,780	33,011	32,244	33,498	178,185

GRAPHICS ACTIVITY

DIRECTIONS: Using the graphics program available in your room, create a poster announcing the Sweetheart Dance on February 14 at 7 o'clock in your school gymnasium. Use clip art pictures from the computer's graphics library to decorate. Use appropriate borders, and if possible, print in color. Proofread carefully before printing.

Use the blank area below to plan your layout before you go to the computer. Check all spelling!

COURSE: Exploring Business & Marketing

UNIT: Information Systems

COMPETENCY: 4.00 Evaluate personal interests and aptitudes in pursuing a career in information systems and simulate related activities.

OBJECTIVE: 4.04 Evaluate personal options in pursuing a career in information systems.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Use the "Tree of Knowledge" handout to record the unit name and a related career.	Tree of Knowledge--Appendix
2. Use the handout entitled "Is This Career Right For You?" for students to evaluate personal options when pursuing a career in information systems.	Is This Career Right For You?--Appendix

Exploring Business and Marketing

Unit C:

Accounting and Finance

COURSE: Exploring Business & Marketing

UNIT: Accounting and Finance

COMPETENCY: 5.00 Explain the role of accounting and financial services in business.

OBJECTIVE: 5.01 Explain the basic accounting equation.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Use Information Sheet, Accounting Terms, and the overhead transparency to explain the accounting equation.	Information Sheet--The Accounting Equation (C501-A1) Vocabulary--Accounting Terms (C501-A2) Transparency--The Accounting Equation (C501-T1)
2. Have students figure their net worth on the handout, "Your Net Worth."	Your Net Worth (C501-A3)
3. Have students complete the handout, "Accounting Applications Worksheet."	Accounting Applications Worksheet (C501-A4)

INFORMATION SHEET: THE ACCOUNTING EQUATION

The success of any business, large or small, depends on the decisions that the owners of the business make. In order to make sound financial decisions, the owners must keep records that show everything of value that the business owns. These items are called **assets**. Some examples of assets are cash, office equipment, buildings, and land.

Owners of a business must also keep records that show the amount of money owed by the business. These are called **liabilities**. An example of a liability would be a business buying a computer for $5,000 and borrowing a portion of the money from a bank in order to pay for it. The business would agree to make payments each month until the computer is paid for. The amount that the business owes to the bank is called a *liability*.

The difference between the value of what is owned by the business and what is owed by the business is called **owner's equity**. In the study of **accounting**, this formula is called the **accounting equation**.

ASSETS = LIABILITIES + OWNER'S EQUITY

To illustrate the equation, think of the computer that was bought by the business. The cost of the computer was $5,000. The business only had $1,000 to pay for the computer, so a local bank agreed to loan the business the remaining $4,000. The loan becomes a liability of the business. To see clearly this relationship, use the accounting equation.

Assets ($5,000) = Liabilities ($4,000) + Owner's Equity ($1,000)

VOCABULARY - ACCOUNTING TERMS

1. fiscal period - the length of time covered by an accounting report (usually one month or one year)

2. assets - anything of value owned by a business

3. liabilities - money owed by a business

4. owner's equity - owner's worth, determined by calculating the amount owned by a business (assets) minus the amount owed by a business (liabilities)

5. Balance Sheet - reports the final balances in all asset, liability, and owner's equity accounts on any specific day or fiscal period

6. Income Statement - reports the profit or loss for the fiscal period

7. Statement of Change in Owner's Equity - reports changes that have occurred in the owner's equity account during the fiscal period

8. profit - money made during a fiscal period by income being greater than expenses for the period

9. loss - money lost during a fiscal period by expenses being greater than income for the period

10. accounting statements - reports prepared to summarize the financial changes that have taken place in a business during a fiscal period

YOUR NET WORTH

How many times have you said, "That person is RICH! I wonder how much money he or she has?" What you are really asking is, "How much is that person worth?" Businesses measure how rich they are in terms of *Owner's Equity*. People measure how rich they are in terms of **Net Worth**.

On the Balance Sheet below, make a list of the things that you own and a list of the money you owe to others. The difference between what you *own* and what you *owe* is **your net worth**.

My Personal Balance Sheet

Name:_____ Date: _____

Assets: (Things you own, such as clothes, money, sporting goods, records, etc.)	Value (How much it is worth)
_____	$ _____
_____	$ _____
_____	$ _____
_____	$ _____
TOTAL VALUE OF ASSETS:	$ _____

Liabilities: (Money I owe to people)	Amount
_____	$ _____
_____	$ _____
_____	$ _____
_____	$ _____
TOTAL VALUE OF LIABILITIES:	- $ _____
My NET WORTH (Assets minus liabilities)	$ _____

C501-A3

ACCOUNTING APPLICATIONS WORKSHEET

DIRECTIONS: Using the accounting equation given below, look at the problems and determine the missing amount for each of the question marks.

ASSETS	=	LIABILITIES	+	OWNER'S EQUITY
1. Building Value: $10,000	=	Money owed: $2,000	+	?
2. Office equipment: $3,500	=	?	+	$1,000
3. Cash in Bank: $5,000 Typewriter: $ 500 Office furniture: $7,000 Total Assets: ?	=	Money owed: $3,500	+	?

4. Below is a list of assets and liabilities for the Smith Company. Find the *owner's equity* by listing assets and liabilities separately and then applying the accounting equation.

   Furniture: $3,000; Money owed to other businesses: $4,000; Building: $2,500; Cash in Bank: $1,000; Delivery truck: $10,000.

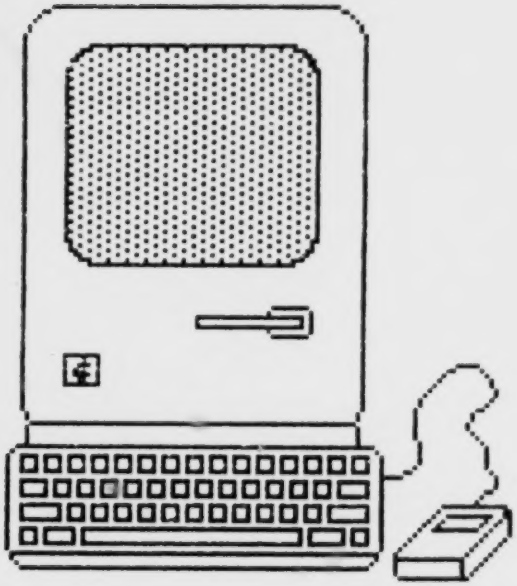
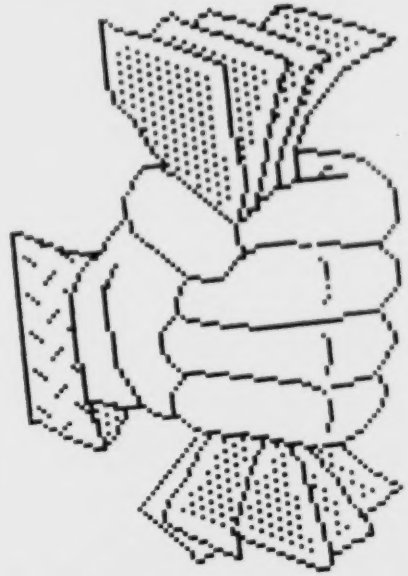
Assets	Value	Liabilities	Value
_____		_____	
_____		_____	
_____		_____	
_____		_____	
Total Assets	_____	Total Liabilities	_____

Equation:

_____ = _____ + _____

Total Assets Total Liabilities Owner's Equity

THE ACCOUNTING EQUATION

ASSETS	=	LIABILITIES	+	OWNER'S EQUITY
				
$5,000	=	$4,000	+	$1,000
COMPUTER	=	BANK LOAN	+	OWNER'S DOWN PAYMENT

C501T1

COURSE: Exploring Business & Marketing

UNIT: Accounting and Finance

COMPETENCY: 5.00 Explain the role of accounting and financial services in business.

OBJECTIVE: 5.02 Describe the types and purposes of accounting statements.

TIME: 2 Class Periods

ACTIVITY	RESOURCES
1. Use the information sheet entitled "The Types and Purposes of Accounting Statements" to explain basic accounting forms.	Information Sheet: Types and Purposes of Accounting Statements (C502-A1 and A2)
2. Use overhead transparencies of the three basic accounting statements to illustrate the formats of the statements.	Income Statement Transparency (C502-T1) Balance Sheet Transparency (C502-T2) Statement of Change in Owner's Equity Transparency (C502-T3)
3. Use the "Accounting Terms" crossword puzzle and the "Accounting Vocabulary Sheet" to reinforce accounting terms. These activities combine the terms of Objectives 5.01 and 5.02.	Crossword Puzzle (C502-A3) (Solution on C502-TK1) Accounting Vocabulary Sheet (C502-A4) (Solution on C502-TK1)
4. Have students complete the income statement, balance sheet, and owner's equity activities.	JSL Enterprises--A Balance Sheet (C502-A5) JSL Enterprises--An Income Statement (C502-A6) JSL Enterprises--A Statement of Change in Owner's Equity (C502-A7)

INFORMATION SHEET: TYPES AND PURPOSES OF ACCOUNTING STATEMENTS

To operate a business and make money, a business owner needs to have up-to-date information. **Accounting statements** provide this information by giving a summary of the financial changes that have taken place in a business during a fiscal period. By studying these statements, the owner can tell whether or not the business is making money.

By comparing accounting statements for different fiscal periods, an owner can tell if the business is doing fine, having a little bit of trouble, or experiencing real problems. If the business is not making enough money, the owner must then try to find out what the problem is and correct the problem. The three main accounting statements that owners study in making these decisions are described in the following text boxes.

THE INCOME STATEMENT: The **Income Statement** reports the profit or loss for the fiscal period. The main purpose of the income statement is to provide a report of the money earned and the expenses of the business over a specific period of time.

The income statement may be handwritten, typed, or prepared by using the computer. If the income statement is handwritten, ink must be used. The income statement contains the following kinds of information: (1) heading, (2) income for the period, (3) expenses for the period, and (4) the total **profit** or **loss** for the period.

STATEMENT OF CHANGE IN OWNER'S EQUITY: One of the most important things an owner of business wants to know is whether the value (equity) in the business has increased or decreased during the fiscal period. A profit will **increase** the balance of the owner's equity account; a loss will **decrease** the balance.

The **Statement of Change in Owner's Equity** reports changes that have occurred in the owner's equity account during the fiscal period. Like the income statement, the statement of change in owner's equity may be handwritten, typewritten, or prepared by the computer. If the report is handwritten, ink must be used.

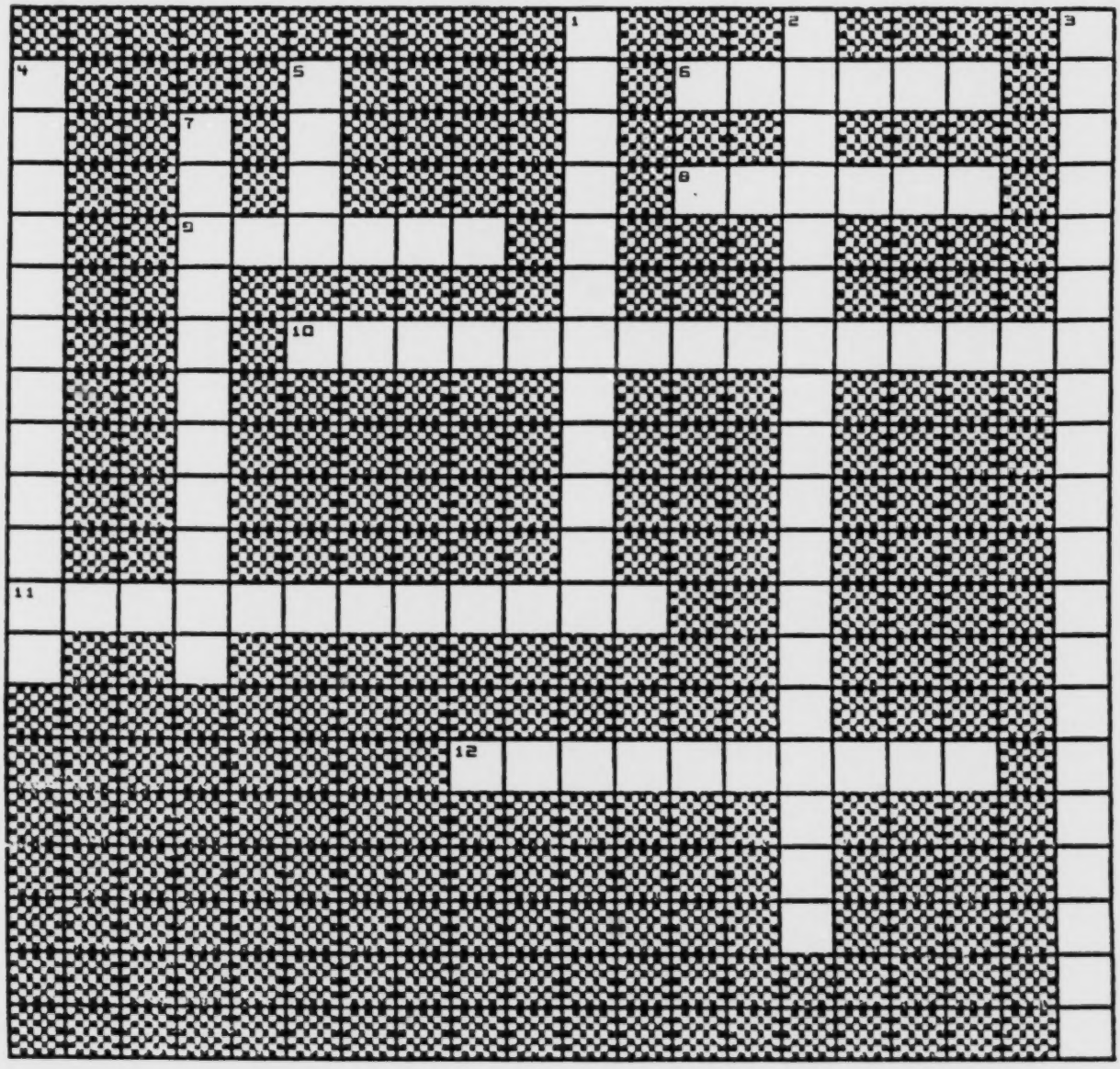
The statement of change in owner's equity contains the following information: (1) heading, (2) beginning capital as of the first day of the fiscal period, (3) net income or loss for the period, and (4) ending capital as of the last day of the fiscal period.

BALANCE SHEET: The **Balance Sheet** reports the final balances in all asset, liability, and owner's equity accounts at the end of the fiscal period. The purpose of the balance sheet is to show the financial position of the business on a given day. It tells what the business owns, owes, and is worth.

Like the income statement and statement of change in owner's equity, the balance sheet may be handwritten, typewritten, or prepared by the computer. If the balance sheet is handwritten, ink must be used. The balance sheet contains the following information: (1) heading, (2) assets section, and (3) liabilities and owner's equity sections.

A very important fact to remember about the balance sheet is that it is the accounting statement that represents the *basic accounting equation*: **Assets = Liabilities + Owner's Equity**. The two sides of the balance sheet ***must*** equal each other.

ACCOUNTING TERMS



ACROSS CLUES

6. Profit, amount left after all expenses have been paid.
8. Income is greater than expenses.
9. Anything of value owned by a business.
10. Reports the profit or loss for the fiscal period.
11. Amount owned - amount owed.
12. Recording or keeping track of the money that a business receives and spends.

DOWN CLUES

1. Reports final balances in all asset, liability, and owner's equity accounts.
2. Assets = Liabilities + Owner's Equity.
3. Reports that summarize the financial changes that have take place during the fiscal period.
4. Period of time covered by an accounting report.
5. When expenses are greater than income.
7. Money owed by the business.

C502A3

ACCOUNTING VOCABULARY SHEET

LOOK at the definitions and fill in the missing letters to make the words complete.

_ss_ _ _	anything of value owned by a business
l_ _s	expenses are greater than income
_ia_ _l_t_es	money owed by the business
f_s_ _l p_ _iod	the length of time covered by an accounting statement
B_l_ _ _e Sh_ _ _	reports the final balances in all asset, liability, and owner's equity accounts on any specific day
_r_f_t	income is greater than expenses
I_ _om_ St_ _ _ment	reports the profit or loss for the fiscal period
_ _ _ _r's E_ _ity	amount owned by the business minus amount owed by the business
A_ _ou_ _ing S_ _t_ments	reports prepared to summarize the financial changes that have taken place in a business during a fiscal period
St_tem_ _t of _ _ _nge in O_ _ _r's Eq_ _ _ _	Reports changes that have occurred in the owner's equity account during the fiscal period

C502-A4

JSL Enterprises - A Balance Sheet

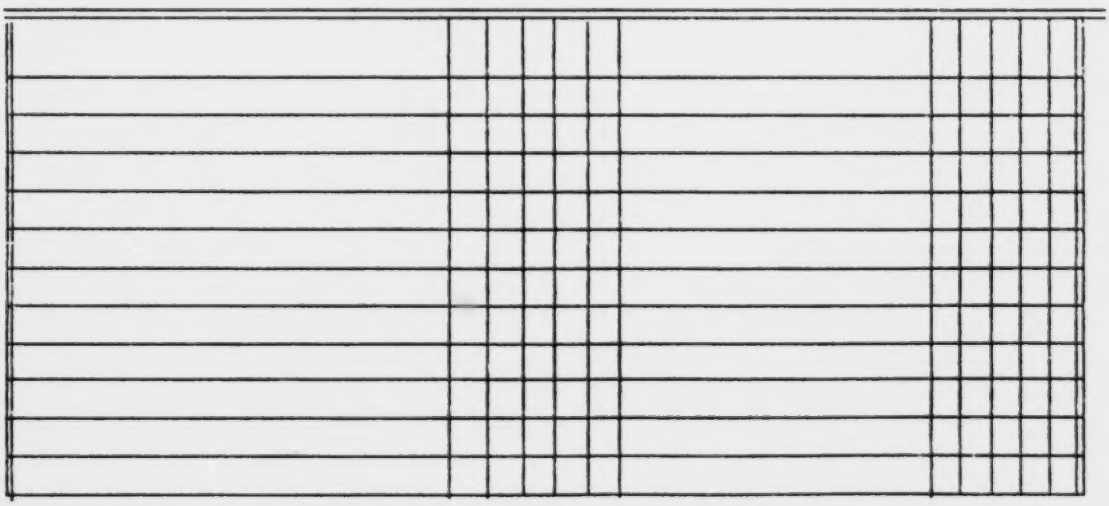
Accounts Receivable and Accounts Payable are terms frequently used in accounting. Can you guess which one is an asset and which one is a liability?

Accounts Receivable is an asset. The business will receive money owed to them by a person or another business.

Accounts Payable is a liability. The business owes money to a person or another business.

Use the following figures to prepare a balance sheet for JSL Enterprises on the form below for the month of December.

a. Cash - $5,900
b. Office Supplies - $400
c. Store Merchandise - $49,700
d. Office Furniture - $5,800
e. Accounts Receivable - $1,000
f. Accounts Payable-$490
g. JSL Enterprises, Owner's Equity - $52,310

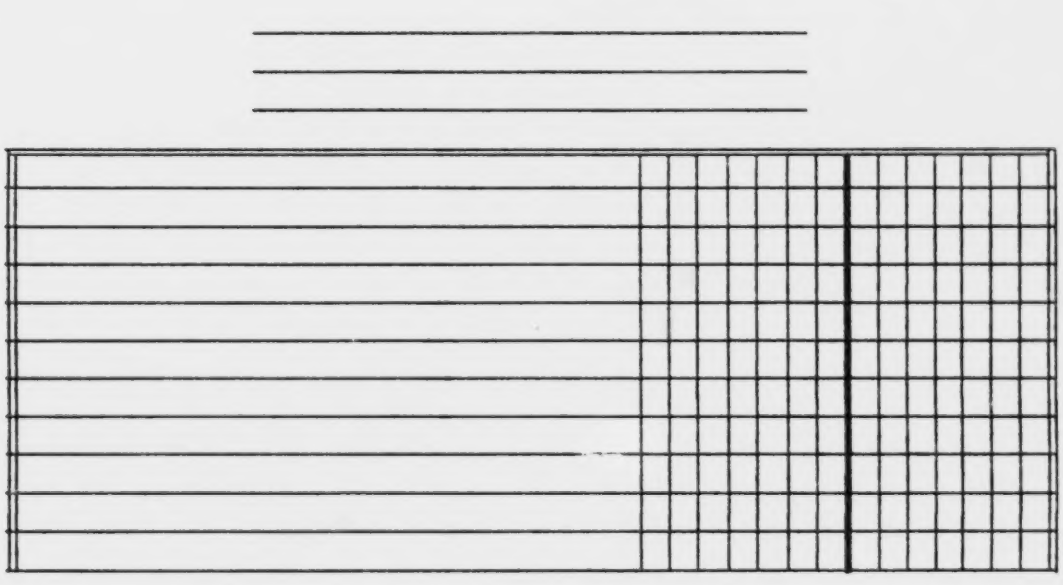


Remember: Assets=Liabilities+Owner's Equity

JLS Enterprises - An Income Statement

JSL Enterprises earns money or income by selling merchandise. Their sales for the month of February were $4,500. Their expenses for the month were Salary Expense - $1,750; Rent Expense - $500; and Office Supplies Expense - $100.

Prepare an income statement for JSL Enterprises for the month of February on the form below.



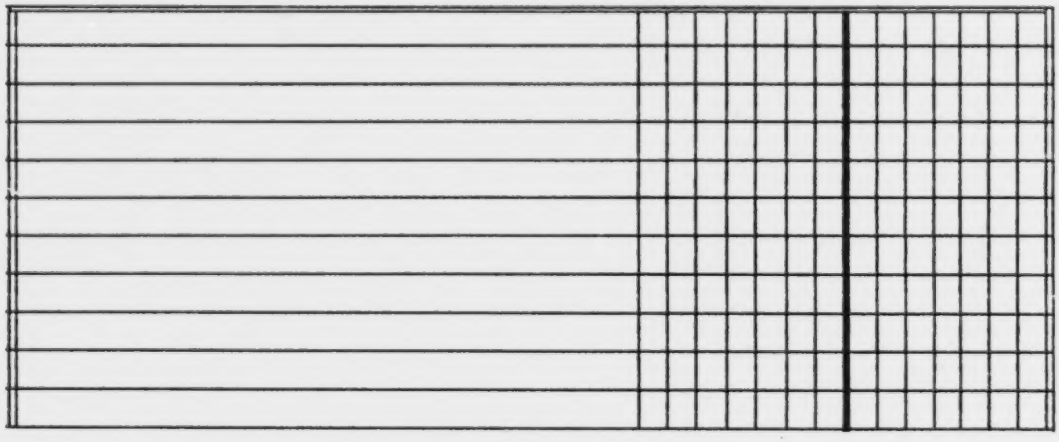
What is the difference between **net income** and **net loss**?

Which did JLS Enterprises have?

JSL Enterprises - A Statement of Change in Owner's Equity

JSL Enterprises must show the changes that occurred in the owner's equity account during the month of February. Using the net income from JSL Enterprises-An Income Statement, prepare a Statement of Change in Owner's Equity on the form provided below.

JSL Enterprises' capital at the beginning of February was $8,500.



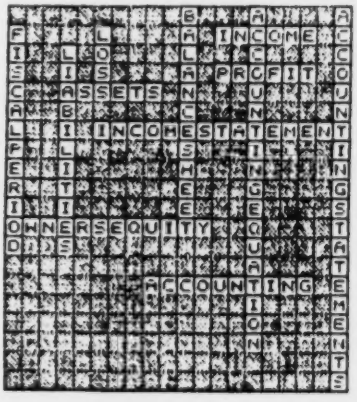
Remember: If the owner of the business had invested additional money or withdrawn money from the business, these would also be recorded on the Statement of Change in Owner's Equity.

List some reasons why an owner might withdraw money from his business during the month.

WORD LIST: ACCOUNTING TERMS

ACCOUNTING
ACCOUNTINGEQUATION
ACCOUNTINGSTATEMENTS
ASSETS
BALANCESHEET
FISCALPERIOD
INCOME
INCOMESTATEMENT
LIABILITIES
LOSS
OWNERSEQUITY
PROFIT

ANSWERS: ACCOUNTING TERMS



C502-TK1

BEST COPY AVAILABLE

Income Statement

Income Statements show the income and the expenses of a business over a specific period of time. They are written following a certain form.

JSL Enterprises
Income Statement
For the month ended May 31, 19__

Heading

Income:		
Sales		2500 00
Expenses:		
Electricity Expense	75 00	
Rent Expense	1000 00	
Gasoline Expense	350 00	
Total Expenses		1425 00
Net Income		1075 00

Expenses

Income

When a business has more income than expenses, it has a **net income**. When a business has more expenses than income, it has a **net loss**.

Balance Sheet

Balance Sheets show the financial condition of a business on a particular day. They are written following a certain form.

JSL Enterprises
Balance Sheet
May 31, 19—

← Heading

Assets							Liabilities						
Cash		2	0	0	0	50	Accts. Payable						
Office Equipment		2	5	0	0	00	Miller Tool Co.		1	5	0	0	00
Shop Equipment		5	0	0	0	00	Crosly Inc.		2	0	0	0	00
Tools			5	0	0	00	Total Liabilities		3	5	0	0	00
							Owner's Equity						
							JSL Enterprises		6	5	0	0	50
Total	1	0	0	0	0	50	Total	1	0	0	0	0	50

Assets - on left side

Liabilities and Owner's Equity - on right side

The balance sheet follows the accounting equation: Assets=Liabilities+Owner's Equity. The double line across the bottom of the balance sheet shows that the left side and the right side are equal.

Statement of Change in Owner's Equity

Statements of Change in Owner's Equity show the changes that have occurred in the owner's equity account during the fiscal period. They are written following a certain form.

JSL Enterprises
Statement of Change in Owner's Equity
For the month ended May 31, 19–

Heading

Beginning Capital, May 1, 19–				8	9	2	5 00
Net income				1	0	7	5 00
Ending Capital, May 31, 19–				1	0	0	0 0 00

Net income figure comes from Net Income Statement

This is a very basic Statement of Change in Owner's Equity. Other changes that are recorded on this statement would be an additional investment made by the owner or a withdrawal of cash from the business by the owner.

COURSE: Exploring Business & Marketing

UNIT: Accounting and Finance

COMPETENCY: 5.00 Explain the role of accounting and financial services in business.

OBJECTIVE: 5.03 Explain the role of financial services in business.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Use the job information sheet entitled "Types of Financial Institutions" and the transparency entitled "Suppliers & Users of Funds" to explain the role of financial institutions.	Information Sheet: Types of Financial Institutions (C503-A1-A3) Tranparency: Suppliers & Users of Funds (C503-T2)
2. Use the transparency entitled "Characteristics of Banking Institutions" to help students differentiate among types of financial institutions.	Transparency: Characteristics of Banking Institutions (C503-T1)
3. Have students complete the Accounting and Finance Crossword to reinforce terms.	Accounting & Finance Crossword (C503-A5) (Solution on C503-A6)

INFORMATION SHEET: TYPES OF FINANCIAL INSTITUTIONS

People in business need to have a good working knowledge of our financial system because the financial system provides businesses with potential sources of funds or money. The financial system also provides a way by which funds or money can be transferred to business. Additionally, conditions within the financial system can affect the way businesses spend, save, and borrow money.

Individuals, businesses, and governments are both the suppliers and the users of the funds within our economic system. This is a key to understanding our financial system. Employee wages, profits from the business, and governmental tax monies are deposited into financial institutions. Once these financial institutions receive the funds, they must then decide what to do with them. They may do several things. One choice they have is to buy **financial securities**, such as stocks and bonds, on financial markets. **Financial markets** are places where funds may be exchanged or financial securities may be bought and/or sold. Another choice they have is to lend money to individuals, businesses, or governments. Our financial system is formed through the interaction of the suppliers and users of funds, financial institutions, and financial markets. (View Transparency C503-T2 to see an illustration.)

There are several major financial institutions which a business may turn to as sources of funds: banks, pension funds, and insurance companies. Let's examine these three major financial institutions by studying the following textboxes.

Banks are the first of the major financial institutions. Commercial banks, savings and loan associations, and credit unions are all banking institutions. They accept money deposits made by individuals, firms, and governments and lend this money to others. *Commercial banks* are the largest of these institutions; they provide business users a very large percentage of the money they need to borrow. Individuals, not businesses, are more likely to use *savings and loan associations* and *credit unions*.

The central bank of the United States, known as the **Federal Reserve System**, writes the rules under which member banks must operate. It also acts as the network for processing checks throughout the banking system. However, the main job of the Federal Reserve is to regulate the amount of money and credit available in the economy.

Pension funds are another type of financial institution. Pension funds are established to provide income to retired or disabled persons. These funds are established through contributions or payments by individuals and the businesses that employ them. The money in a pension fund must grow to meet the retirement needs of employees. They are usually managed by large commercial banks or insurance companies. By investing the contributions of individuals, pension funds can make enough money to pay benefits to these people upon retirement.

Insurance companies comprise the second major financial institution. They invest billions of dollars through financial markets. They can do this because they must invest the **premiums** from their policyholders. A premium is a sum of money an individual or business pays to an insurance company for insurance against certain risks. By investing these premiums, insurance companies can make enough money to pay the insurance claims of their policyholders.

Insurance is provided by both *private companies* and *government agencies*. In fact, the government is the largest single provider of insurance in the United States. The three main types of government insurance are **social security, workmen's compensation,** and **unemployment insurance.**

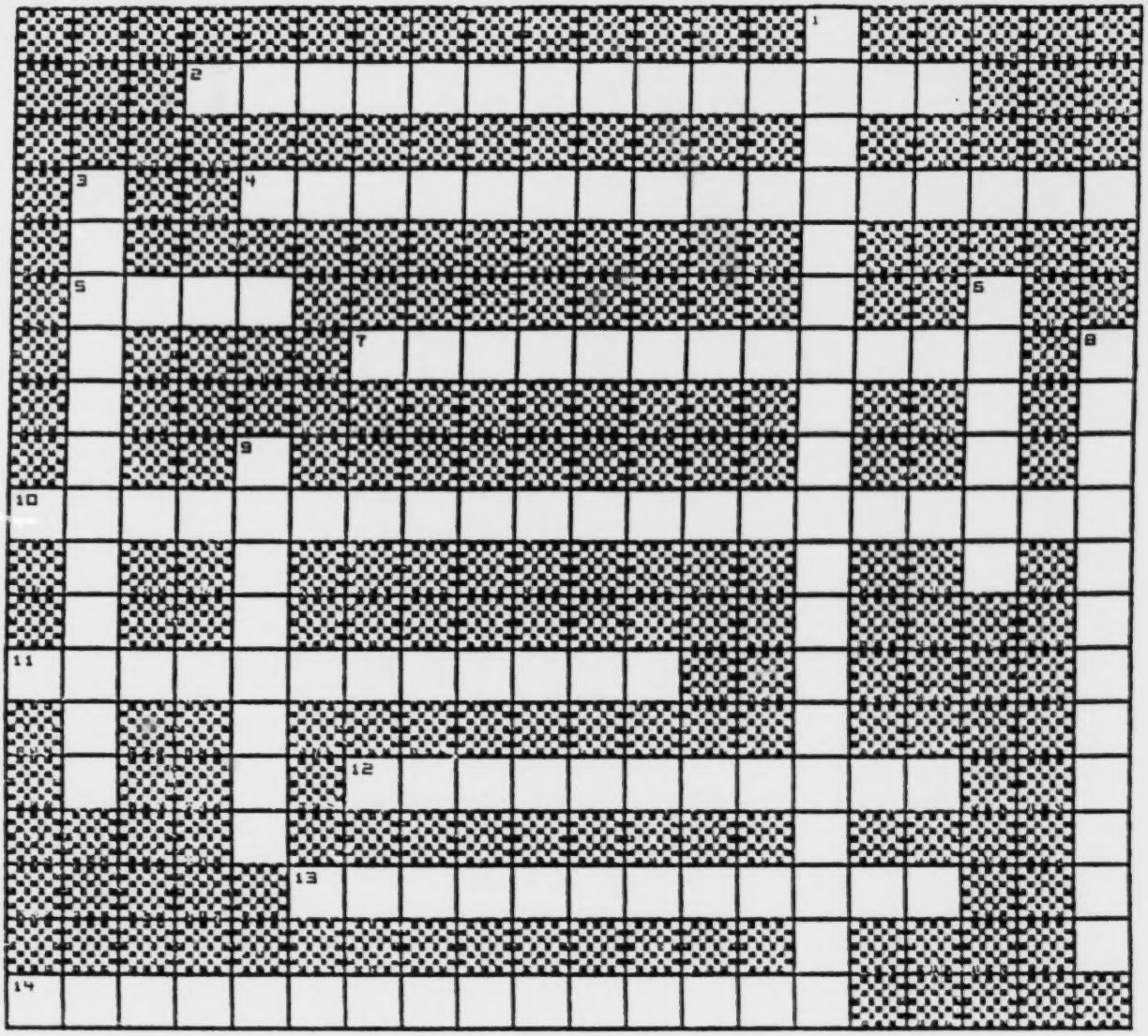
Social Security is designed to provide Americans with some economic insurance against loss of income due to retirement, disability, illness, or the death of a wage earner. The funds for social security comes from money that is withheld from a worker's wages.

Workmen's compensation is insurance which compensates employees who are injured on the job, regardless of who is at fault. This insurance is required by law. Medical expenses and a portion of lost income are paid while the worker is out of work due to the injury. If an employee is killed from a work-related accident, the survivors receive workmen's compensation payments. Business firms pay the premiums for workmen's compensation insurance.

Unemployment insurance provides weekly income benefits to unemployed workers. Workers only receive a portion of their regular salary and benefits are only paid for a specified amount of time. Business firms pay the premiums for unemployment insurance.

With all of these sources of money available, it is clear to see why people in business need to have a good working knowledge of our financial system in order to provide for the needs of their employees and best protect their business interests.

Accounting & Finance Crossword



ACROSS CLUES

2. Economic insurance that comes from money that is withheld from a worker's wages.
4. Places where funds may be exchanged.
5. Expenses are greater than income.
7. Cooperative lending institutions.
10. Agency that regulates the amount of money and credit available in the economy.
11. Another name for retirement funds.
12. Money owed by a business.
13. Amount owned by business minus amount owed by business.
14. The largest financial institution.

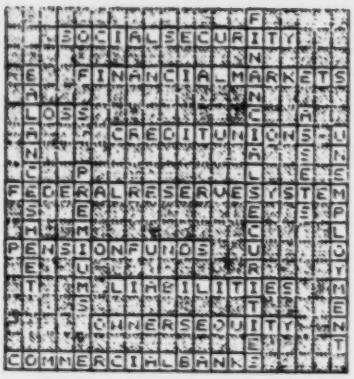
DOWN CLUES

1. Stocks and bonds.
3. Reports the final balances in al asset, liability, and owner's equity accounts.
6. Anything of value owned by a business.
8. Insurance that provides income benefits to workers who have los their jobs.
9. Sum of money paid to an insuranc company for insurance against certain risks.

WORD LIST: Accounting & Finance Crossword

ASSETS
BALANCESHEET
COMMERCIALBANKS
CREDITUNIONS
FEDERALRESERVESYSTEM
FINANCIALMARKETS
FINANCIALSECURITIES
LIABILITIES
LOSS
OWNERSEQUITY
PENSIONFUNDS
PREMIUMS
SOCIALSECURITY
UNEMPLOYMENT

ANSWERS:



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CHARACTERISTICS OF BANKING INSTITUTIONS

Commercial Banks:

* *Extend credit to businesses and individuals.*
* *Accept deposits in the form of savings and checking accounts.*
* *Are the primary source of capital (especially of short-term funds) for business.*
* *Offer a wide range of other services, such as insurance and credit cards.*

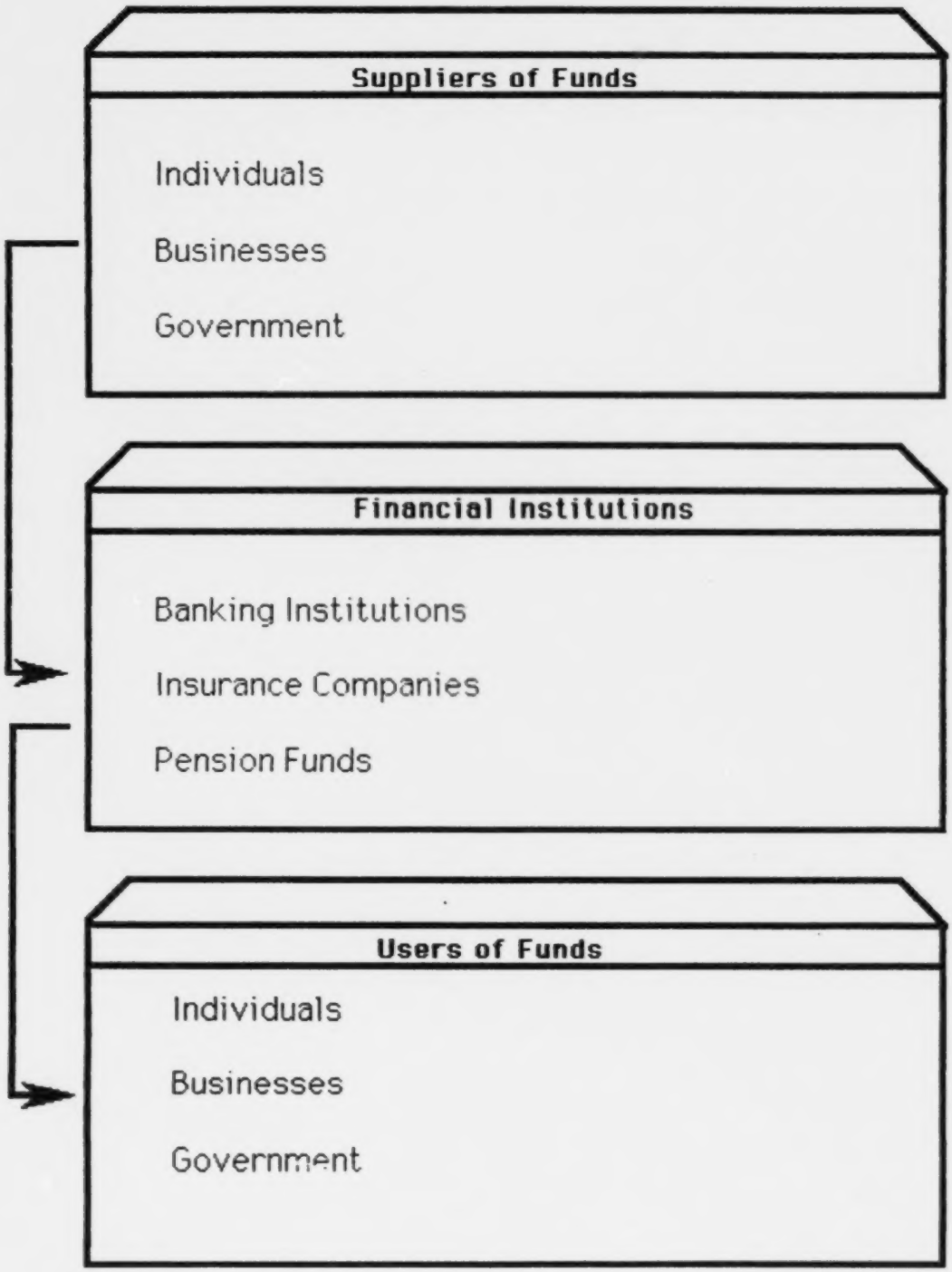
Savings and Loan Associations:

* *Provide checking and savings accounts and loans to individuals.*
* *Invest most of their funds in financing home mortgages.*

Credit Unions:

* *Are cooperative lending institutions.*
* *Are operated by the members of a group of people with similar employment. An example is the State Employees' Credit Union.*

SUPPLIERS AND USERS OF FUNDS



C503T2

COURSE: Exploring Business & Marketing

UNIT: Accounting and Finance

COMPETENCY: 5.00 Explain the role of accounting and financial services in business.

OBJECTIVE: 5.04 Explain the use of computers in accounting and financial services.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Invite a speaker to discuss changes that have taken place in her/his job because of the use of computers. 2. Have students list the ways an activity in Objective 6.03 or 6.04 was made easier by using the computer. NOTE: This is a follow-up activity to be done after the computer activities.	

COURSE: Exploring Business & Marketing

UNIT: Accounting and Finance

COMPETENCY: 6.00 Evaluate personal interests and aptitudes in pursuing a career in an accounting and finance occupation and simulate typical problems.

OBJECTIVE: 6.01 Investigate the current opportunities in accounting and finance occupations.

TIME: 2 Class Periods

ACTIVITY	RESOURCES
1. Use the Interview Sheet to talk with a person who is currently working in an accounting occupation.	Interview Sheet (C601-A1) Guest Speaker
2. Use the Interview Sheet to talk with a person who is currently working in a finance occupation.	Interview Sheet (C601-A1) Guest Speaker
3. Check the want ads of the local newspaper or the Employment Security Commission listing sheet to determine the availability of accounting and finance jobs in the community.	Mission Possible (C601-A2) Employment Security Commission

INTERVIEW SHEET

Interview a person who is currently working in an accounting or finance occupation. The following are suggestions for interview questions.

1. What are the main duties or responsibilities in your job?

2. How long have you been working at this job?

3. What courses did you take in high school that were helpful to you when you started to work?

4. Will I be able to get a job in this field with only a high school education?

5. Will I be able to advance in this field with only a high school education?

6. What are some characteristics that would be helpful to a person in this job?

7. What is your favorite part of your job?

8. What is your least favorite part of your job?

MISSION POSSIBLE

Your mission, should you decide to accept it, is to determine whether or not there are jobs available in our community in the fields of accounting and finance. There are 3 steps in this mission. Completing all three steps will earn you the grade of an A for this mission.

STEP 1:

The first step of your mission is not a difficult one; therefore, if you choose to complete only Step 1, you will earn the grade of a "C" for this mission. To complete Step 1, search the employment section of your local newspaper for job opportunities in the areas of accounting and finance. Cut out the three ads that look the most interesting to you and staple or glue them to a sheet of paper.

STEP 2:

The second step of your mission is a little more difficult; therefore, if you choose to complete Step 2 you will earn the grade of a "B" for this mission. To complete Step 2, use the telephone to call one of the ads you have cut out of the newspaper. Introduce yourself as a student in a Business and Marketing class and ask for additional information and job qualifications about the job advertised in the ad. Write a short report about what you learned, or give an oral report to your class.

STEP 3:

The third step of your mission is the most difficult; therefore, if you choose to complete Step 3 you will earn the grade of an "A" for this mission. To complete Step 3, get an application for employment from one of the ads you cut out of the newspaper. (You may call them and ask if they will mail it to you.) Share with your class some of the information that employment applications ask for.

GOOD LUCK WITH YOUR MISSION. THIS PAPER WILL NOT SELF-DESTRUCT AT ANY TIME.

COURSE: Exploring Business & Marketing

UNIT: Accounting and Finance

COMPETENCY: 6.00 Evaluate personal interests and aptitudes in pursuing a career in an accounting and finance occupation and simulate typical problems.

OBJECTIVE: 6.02 Assess the education, experience, and other requirements for accounting and finance occupations.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Use the handout, "Tree of Knowledge--Job Information Questions," to access the education, experience, and other requirements for accounting and finance occupations.	Tree of Knowledge--Job Information Questions (Appendix A)

COURSE: Exploring Business & Marketing

UNIT: Accounting and Finance

COMPETENCY: 6.00 Evaluate personal interests and aptitudes in pursuing a career in an accounting and finance occupation and simulate typical problems.

OBJECTIVE: 6.03 Simulate problems typical for accounting workers using database and spreadsheet software.

TIME: 3 Class Periods

ACTIVITY	RESOURCES
1. Determine whether JSL Enterprises made a profit or is operating at a loss. Use spreadsheet software.	JSL Enterprises Transaction Sheet (C603-A1) Cash Payments and Receipts Form (CC603-A2)
2. Keep a Cash Journal. Use spreadsheet software.	Keeping a Journal (C603-A3) Vocational Club Journal (C603-A4)
3. Create a database of customers who owe money. Use database software. Follow the instructions to create three database reports.	Customer Database (C603-A5)
4. Create a database of students in your class and create at least two reports. Use database software.	Business and Marketing Database (C603-A6)
5. Determine the cash flow of Sally Smith using spreadsheet software.	Sally Smith Cash Flow (C603-A7)

JSL Enterprises

Keep the following records for JSL Enterprises, using the "Cash Payments and Receipts" form (C603-A2). Determine if the company made money (a profit) or if it is operating at a loss. (HINT: JSL Enterprises made a profit if Cash Receipts are greater than Cash Payments.)

1. Transactions which involve the receiving of money should be placed in the "Cash Receipts" column.

2. Transactions which involve payments should be placed in the "Cash Payments" column.

3. Get a balance by subtracting the "Cash Payments" column from the "Cash Receipts" column.

4. Determine if the company made money (a profit) or if it is operating at a loss.

September	1	Cash on hand	$25.00
	8	Spent for office supplies	10.00
	12	Contribution to United Fund	5.00
	14	Sold letter rack	5.00
October	5	Sold furniture to student	2.50
	8	Paid lumber company for wood	15.00
	14	Collected dues for social	10.00
	25	Sold bookends to club	30.00
November	3	Bought gift for employee	5.00
	8	Purchased stamps	10.00
	10	Collected for Christmas cards	8.35
December	10	Proceeds from party	22.25
	15	Paid book store	11.40
	16	Paid bakery for refreshments	15.00

Balance _____

Cash Payments & Receipts

DATE	TRANSACTION	CASH RECEIPTS	CASH PAYMENTS	ACCOUNT BALANCE

*ENDING BALANCE _____

*Indicate Profit with a + sign or Loss with a - sign.

C603-A2

Cash Payments & Receipts

DATE	TRANSACTION	CASH RECEIPTS	CASH PAYMENTS	ACCOUNT BALANCE
9/1	Cash on hand			25.00
9/8	Office supplies		10.00	15.00
9/12	United Fund donation		5.00	10.00
9/14	Sold letter rack	5.00		15.00
10/5	Sold furniture	2.50		17.50
10/8	Paid for wood		15.00	2.50
10/14	Dues for social	10.00		12.50
10/25	Sold bookends	30.00		42.50
11/3	Gift for employee		5.00	37.50
11/8	Stamps		10.00	27.50
11/10	Collected for cards	8.35		35.85
12/10	Party receipts	22.25		58.10
12/15	Paid book store		11.40	46.70
12/16	Refreshments		15.00	31.70

*ENDING BALANCE +$31.70

*Indicate Profit with a + sign or Loss with a - sign.

C603-TK1

KEEPING A JOURNAL

As secretary-treasurer of your Vocational Club, you are expected to keep a Journal. This is a record of all money received and spent by the club. Your records will cover the period from September 1 through January 31. Use the Vocational Club Journal (C603-A4) for recording the following transactions. Remember: Income is added to the balance and expenses are subtracted from the balance.

September

1 Cash on hand (record in the balance column) - $10.50
3 Spent $1.05 for poster paper
7 Spent $4.50 for refreshments for meeting
8 Spent $3.00 for streamers for homecoming parade
30 Received September dues paid by club members - $12.00

October

2 Bought postal cards - $.96
10 Spent $2.75 for refreshments
25 Gave $5.00 to the United Fund Drive
31 Received October dues paid by members - $12.00

November

15 Spent $9.00 for awards for fair exhibits
30 Received November dues paid by members - $12.00

December

5 Received money from Project 9--painting classrooms - $19.50
6 Received from Christmas card sales - $51.50
20 Received proceeds from Christmas Dance - $75.00
21 Paid for gifts for needy children - $15.00
21 Paid for refreshments served at Christmas - $12.95
21 Received December dues paid by members - $14.50

January

3 Paid national Vocational Club dues - $24.00 ($2.00 per member)
10 Paid convention expenses for 3 members - $45.00 ($15.00 per member)
15 Paid cash gifts to 3 Honor Members - $15.00 (5.00 each)
20 Paid postage - $2.75
31 Received January dues paid by members - $5.00

To check your work, find the total of the income column and the total of the expense column. The difference between them added to the beginning cash on hand ($10.50) should equal the last figure in the balance column.

Vocational Club Journal

DATE	EXPLANATION	INCOME	EXPENSES	BALANCE

ENDING BALANCE_____

C603-A4

Vocational Club Journal

DATE	EXPLANATION	INCOME	EXPENSES	BALANCE
9/1	Cash on hand			10.50
9/3	Poster paper		1.05	9.45
9/7	Refreshments		4.50	4.95
9/8	Streamers		3.00	1.95
9/30	Sept. dues	12.00		13.95
10/2	Postal cards		.96	12.99
10/10	Refreshments		2.75	10.24
10/25	United Fund		5.00	5.24
10/31	Oct. dues	12.00		17.24
11/15	Exhibit Awards		9.00	8.24
11/30	Nov. dues	12.00		20.24
12/5	Proj. 9 pay	19.50		39.74
12/6	Card sales	51.50		91.24
12/20	Dance receipts	75.00		166.24
12/21	Children's gifts		15.00	151.24
12/21	Refreshments		12.95	138.29
12/21	Dec. dues	14.50		152.79
1/3	National dues		24.00	128.79
1/10	Convention exp.		45.00	83.79
1/15	Honor gifts		15.00	68.79
1/20	Postage		2.75	66.04
1/31	Jan. dues	5.00		71.04

ENDING BALANCE $71.04

C603-TK2

CUSTOMER DATABASE

Listed below are the customers who owe money to JSL Enterprises. Create a database of these customers using the computer. After entering the information into the database, follow the instructions given below the data to create JSL Enterprises reports.

William E. Smith
555 West Street
Dallas TX 23234
$4,500

Alex B. Belini
444 State Street
Charleston, SC 87345
$1,244

Rosa Hernandez
601 Fourth Street
New York, NY 45692
$3,000

Sylvan Art Supply
West 9th Street
New York, NY 45692
$2,455

Steinbeck Furniture Company
1000 Columbus Road
New York, NY 45692
$1,225

Miquel Santeago
672 Russ Avenue
Dallas, TX 23234
$3,000

Instructions: Make the following reports using the database.

Report 1: Make an alphabetical list of the customers.

Report 2: Make and alphabetical list of the customers who live in New York.

Report 3: Make a list of customers and the amounts they owe in descending order with the customer who owes the most money listed first and the customer who owes the least money listed last.

BUSINESS & MARKETING DATABASE

Businesses often create databases of their employees. This helps them keep track of employee addresses, birthdates, and other important information.

Create a database of the students in our business and marketing class. The following are examples of what the categories/fields might be: name, address, city, state, telephone number, favorite food, color of eyes, favorite sport, hobby, birthdate. You may use others if you'd like to.

Use your database to make at least two reports. An example of a report might be a record of which students in the class have blue eyes or which students in the class listed pizza as their favorite food.

SALLY SMITH CASH FLOW

Sally Smith would like to have a new bicycle, but she found that they are very expensive. She decided to save some money every week. Your job is to help her decide how much she can save every week to put towards the new bicycle.

Use the following information to complete a cash flow analysis for Sally. She earns $21 a week for delivering newspapers and receives a $10 allowance each week. She spends about $6 a week on snack food, $6 a week going to the movies or renting videos, and $5 on clothes.

1. Create a spreadsheet according to the example that follows.
2. Increase the width of column A so that all of the labels will fit.
3. Use currency format in columns B and C and two decimal places, if possible.
4. Create a formula to determine the *Total Weekly Income*.
5. Create a formula to determine the *Total Weekly Expenses*.
6. Enter a formula to determine the *Weekly Savings (Weekly Savings = Total Weekly Income - Total Weekly Expenses)*.
7. Save and print the spreadsheet.

	A	B	C
1	Sally Smith Cash Flow		
2			
3	Weekly Income		
4	Paper Delivery	$21.00	
5	Allowance	?	
6	Total Weekly Income		?
7			
8	Weekly Expenses		
9	Snack Food	$6.00	
10	Movies & Videos	?	
11	Clothes	?	
12	Total Weekly Expenses		?
13			
14	Weekly Savings		?

If the new bike that Sally would like to have costs $175, how many weeks will she have to save in order to buy it?

COURSE: Exploring Business & Marketing

UNIT: Accounting and Finance

COMPETENCY: 6.00 Evaluate personal interests and aptitudes in pursuing a career in an accounting and finance occupation and simulate typical problems.

OBJECTIVE: 6.04 Simulate problems typical for finance workers.

TIME: 3 Class Periods

ACTIVITY	RESOURCES
1. Analyze the automobile insurance policy carried on cars belonging to JSL Enterprises.	JSL Enterprises Automobile Insurance (C604-A1)
2. Keep a checkbook for JSL Enterprises.	JSL Enterprises Checkbook (C604-A2) Keeping a Checkbook (C604-A3)
3. Set up a spreadsheet using the handout "Keeping a Checkbook" and "Checkbook Spreadsheet."	Keeping a Checkbook (C604-A3) Checkbook Spreadsheet (C604-A4)
4. Obtain a copy of either a property insurance policy or an automobile insurance policy. Make a list of losses that are covered and a list of losses that would not be covered.	

JSL Enterprises Automobile Insurance

JLS Enterprises carries automobile insurance on each of their company cars. Below is the list of coverage and cost for each car for a six-month period. Answer the questions below based on the insurance coverage information.

Coverage	Cost
Bodily injury/property damage $100,000/300,000/50,000	$ 126.82
Medical payments coverage	50.22
Comprehensive	27.03
Collision with $200 deductible provision	59.68
Emergency road services	1.00
Uninsured motor vehicle $100,000/300,000/5,000	19.00

1. How much is JSL Enterprises' insurance premium for six months?

2. If JLS Enterprises were involved in an accident and they were at fault, how much would the insurance company pay to cover the liability for injuries to others?

3. How much would the company pay as a maximum for injuries to one other person injured in the accident in which JSL Enterprises was at fault?

4. What would be the maximum coverage for damage to the property of others in the accident?

5. A JLS Enterprises driver hit a telephone pole with the car. Repairs will cost $1,500. With their coverage, how much of the repairs will JSL have to pay themselves? Explain why.

6. If a customer riding in a car belonging to JLS Enterprises was injured in an accident, what is the maximum coverage for medical expenses for that person?

7. While parked in a city parking lot, a car belonging to JSL Enterprises was damaged by a group of rowdy teenagers who wrote on the car with paint. What type of coverage in the policy would cover the cost of this damage?

8. If a JLS Enterprises car was involved in an accident with a car belonging to a person who had no insurance, what type of coverage would protect JSL Enterprises?

JSL ENTERPRISES CHECKBOOK

To _____

For _____

	DOLLARS	CENTS
Bal. Bro't. For'd.		
Am't. Deposited		
" " "		
" " "		
Total		
Am't. This Check		
Bal. Car'd. For'd.		

_____ 19 ____ 00-000

PAY TO THE ORDER OF _____ $ _____

_____ DOLLA

FOR _____

⑈0000⑈0000⑆ 1239 876543⑈ NOT NEGOTIABLE

No. _____ $ _____

_____ 19 ____

To _____

For _____

	DOLLARS	CENTS
Bal. Bro't. For'd.		
Am't. Deposited		
" " "		
" " "		
Total		
Am't. This Check		
Bal. Car'd. For'd.		

NO. _____

_____ 19 ____ 00.000 / 000

PAY TO THE ORDER OF _____ $ _____

_____ DOLLA

FOR _____

⑈0000⑈0000⑆ 1239 876543⑈ NOT NEGOTIABLE

No. _____ $ _____

_____ 19 ____

To _____

For _____

	DOLLARS	CENTS
Bal. Bro't. For'd.		
Am't. Deposited		
" " "		
" " "		
Total		
Am't. This Check		
Bal. Car'd. For'd.		

NO. _____

_____ 19 ____ 00.000 / 000

PAY TO THE ORDER OF _____ $ _____

_____ DOLLAR

FOR _____

⑈0000⑈0000⑆ 1239 876543⑈ NOT NEGOTIABLE

No. _____ $ _____

_____ 19 ____

To _____

For _____

	DOLLARS	CENTS
Bal. Bro't. For'd.		
Am't. Deposited		
" " "		
" " "		
Total		
Am't. This Check		
Bal. Car'd. For'd.		

NO. _____

_____ 19 ____ 00.000 / 000

PAY TO THE ORDER OF _____ $ _____

_____ DOLLAR

FOR _____

⑈0000⑈0000⑆ 1239 876543⑈ NOT NEGOTIABLE

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KEEPING A CHECKBOOK

All financial institutions, as well as businesses, keep a checkbook. They must buy office supplies, pay salaries of their employees, record deposits of money, and pay bills. This is a list of just a few.

You are to write the following checks for JSL Enterprise. You will complete the check stubs and enter deposits in the checkbook. Your balance brought forward on your first check stub will be $500.00. You will number your checks beginning with number 245. Double check your addition and subtraction.

1-26 Paid Friendly Book Store for books and supplies - $8.65

1-26 Deposit - $1,000.33

1-29 Paid Recorder Newspapers, Inc. for advertising - $123.49

2-1 Paid Mary L. Jackson her week's salary - $55.50

2-1 Paid John R. Wright his week's salary - $79.68

2-1 Deposit - $932.49

2-1 Paid James E. Johnson his week's salary - $149.74

2-1 Paid Mace Wholesale Company, Invoice 3497 - $593.35

2-5 Paid to Red Dot Wholesale Company, Invoice 69543 - $436.14

2-7 Gave to the United Fund - $75.00

2-10 Paid to Black's Business Machines for office equipment repairs - $25.23

2-15 Paid Wiley Construction Company for repairs and new shelves - $55.30

CHECKBOOK SPREADSHEET

Use the checkbook entries on the handout *Keeping a Checkbook* to create a spreadsheet.

Below is an example of how the spreadsheet will look. The Beginning Balance and the entries for January 26 are included in the example.

	A	B	C	D	E
1	Date	Beginning Balance	Deposits	Expenses	Explanation
2					
3	1-26	$500.00			
4	1-26			8.65	Book Store
5	1-26		$1000.33		
6					
7					
8					
9					

At the bottom of the spreadsheet, type the word *Totals* and create a formula to total the beginning balance, deposits, and expenses columns.

Then create a formula to give the ending balance:

Beginning Balance + Deposits - Expenses = Ending Balance

Answer Key for Insurance Questions

1. $283.75
2. $300,000
3. $100,000
4. $50,000
5. $200 Because the collison coverage will cover anything over the first $200. JLS Enterprises must pay that amount themselves.
6. $10,000
7. Comprehensive
8. Uninsured motor vehicle

COURSE: Exploring Business & Marketing

UNIT: Accounting and Finance

COMPETENCY: 6.00 Evaluate personal interests and aptitudes in pursuing a career in an accounting and finance occupation and simulate typical problems.

OBJECTIVE: 6.05 Evaluate personal options in pursuing a career in an accounting or finance occupation.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Use the handout, "Is This Career Right for You," for students to evaluate personal options in pursuing a career in accounting and finance.	Is This Career Right for You (Appendix)
2. Use the "Tree of Knowledge" handout to record the unit name and a related career.	Tree of Knowledge (Appendix)

Exploring Business and Marketing

Unit D:

Administrative Support

COURSE: Exploring Business & Marketing

UNIT: Administrative Support

COMPETENCY: 7.00 Explain the functions of administrative support personnel.

OBJECTIVE: 7.01 Explain how administrative support personnel use written and verbal communications.

TIME: 2 Class Periods

ACTIVITY	RESOURCES
1. Discuss how administrative support personnel use written and verbal communications, using "Communications Handout." Differentiate between written and verbal communications.	Communications Information Sheet (D701-A1 & A2)
2. Allow students to brainstorm on the office jobs that require written and verbal communication.	
3. Discuss types of verbal communications. Demonstrate telephone communications using a model phone. Demonstrate effective and ineffective skills.	Communications Information Sheet (D701-A1 & A2)
4. Discuss types of written communications.	Communications Information Sheet (D701-A1 & A2) Business Letter (D701-T1) Memorandum (D701-T2)
5. Invite a guest speaker (Administrative Support Personnel) to share with the class the ways they use written and verbal communication on the job. Have them include their educational background, experience, working conditions, duties, and computer usage.	

COMMUNICATIONS INFORMATION SHEET

In today's modern office, many skills are required of the administrative support personnel. Administrative support personnel (for example, secretaries) are those workers who perform duties for their immediate supervisors, etc. These workers prepare reports, letters, and memorandums that aid in the communication process inside and outside the office. Administrative support personnel also are responsible for preparing and gathering items for business meetings.

When discussing the communication of the administrative support personnel, it is very important that we distinguish between verbal and written communication. First of all, communication is the process of expressing ideas to other persons. Such action is achieved by the use of words, either spoken or written.

VERBAL COMMUNICATIONS

In the business office, you should communicate more formally than in your personal life. Most of the time when you are communicating at work, there is a specific purpose. For example, you may need to transmit or send forward information, to give instructions, or to find help in making decisions. As a result of this, effective speech is mandatory when communicating in the modern office.

Public Speaking/Effective Speech

- Avoid slang.
- Speak clearly.
- Pronounce words properly.
- Use correct grammar.
- Eliminate distracting mannerisms, facial expressions, speech habits, and body gestures.

Administrative support personnel spend much of their time greeting callers or visitors. These workers must reflect the interest and concern of the total organization and be skillful in their communication with others. Administrative support personnel provide valuable assistance. Visitors often judge a company by the way they are greeted.

The Administrative Office Worker must:

- have a genuine interest in people.
- have a thorough knowledge of personnel and company policies.
- have the ability to use reference materials such as atlases, dictionaries, maps, timetables, airline schedules, etc.

Telephone Manners

Because you are representing the entire organization, the sound of your voice and your speech when responding to an incoming call is very important. It is crucial that you give callers a positive impression!

Voice

- Use a normal tone (not too loud or soft).
- Keep your voice low-pitched and calm (not shrill).
- Use expression (not a monotone voice--act interested).

Speech

- Use distinct speech.
- Use a proper pace (not too fast or too slow).
- Emphasize words with care.

Vocabulary

- Avoid using complicated vocabulary. Keep it simple!
- Avoid using technical jargon unless talking with someone who understands.
- Avoid using <u>slang</u>! Expressions used with your friends are not appropriate in the office.
- **<u>NEVER</u> use expletives (curse words)! No matter what you hear on the radio, the television, or elsewhere, cursing is <u>never</u> appropriate!**

Courtesy

- Give all of your attention to the caller.
- Listen attentively and allow the caller to tell you the purpose of the call.
- Take notes on what the caller is saying.
- Record the facts accurately. If you are not sure you have all the information, ask again.
- Verify messages (including the name and phone number of the caller) if the person to whom the call is directed is not immediately available.
- Don't keep the caller waiting. If it is necessary to put the caller on hold, come back to that line quickly.

<u>Written Communications</u>

In the modern office, many documents have to be prepared. These forms circulate both within the company and outside the company. It is very important that these documents are prepared properly, since they ultimately reflect the image of the company. Common forms of written communications include letters, memos, and business reports. Transparencies D701-T1 and D701-T2 are samples of these types of documents. Study these formats, as you will be preparing similar documents later in the unit.

SAMPLE BUSINESS LETTER

1612 Brandywine Court
Winston-Salem, NC 27920
November 15, 19--

Tucker F. Kennedy, Personnel Director
Kenan Memorial Hospital
4589 East Kenan Street
Wallace, NC 28466

Dear Mr. Kennedy

I am writing in response to your advertisement in the November 14 issue of the *Daily Press* for a computer programmer. As indicated on the enclosed, I was recently graduated by East Kansas University with a B.S. degree in Business Education.

Prior to completing my B.S. degree, I earned an A.A.S. degree in Business Computer Programming from Landview Community College. During that training, I gained experience using the following programming languages: RPG II, COBOL, BASIC, and FORTRAN. I also have extensive experience using software packages such as *WordPerfect, Microsoft Windows, Microsoft Excel, Microsoft Word, WordStar, dBase IV, PageMaker, and IBM DOS.*

My experience, along with my desire to excel in the business world, will allow me to be an asset to your hospital. As soon as an appointment can be arranged, I would welcome an opportunity to talk with you.

Sincerely

Tara S. Kennedy

Enclosure

SAMPLE MEMORANDUM

TO: All Board of Directors Members

FROM: Kevin Smith, President

DATE: April 3, 19--

SUBJECT: Schedule of Board Meetings

Thank you for attending our Board of Directors meeting last week. Your work and effort are greatly appreciated.

Please note on your calendars the following meeting dates:

April 9	Meeting Room #2, 8:00 a.m.
April 10	Meeting Room #2, 8:00 a.m.
April 12	Location to be announced, 10:00 a.m.

With your help and continued cooperation, we should be able to reach an agreement this week concerning the items before us. If you have any questions, please contact me as soon as possible.

COURSE: Exploring Business & Marketing

UNIT: Administrative Support

COMPETENCY: 7.00 Explain the functions of administrative support personnel.

OBJECTIVE: 7.02 Explain the duties of administrative support personnel.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Discuss the duties of administrative support personnel.	Administrative Support Personnel Duties (D702-A1) Prepare a poster displaying the various duties of administrative support personnel.
2. Divide the class into groups of 2 or 3 students. Assign each group to one of the duties of the administrative support personnel. Allow the student to cut pictures from magazines that portray people performing the duties of administrative support personnel.	
3. Allow students to illustrate on paper an administrative support personnel performing one of the discussed duties. Use the pictures to design a bulletin board to remain on display during the administrative support unit.	

ADMINISTRATIVE SUPPORT PERSONNEL DUTIES

Administrative support personnel have to be skilled in many areas due to the variety of duties that they must perform. The following is a list of some of the duties that administrative support personnel perform:

Information Processing

Keyboarding, editing, saving, and printing information
Desktop publishing
Entering information into databases and spreadsheets
Having knowledge of networking of computers, etc.

Filing

Arranging items in alphabetical, numerical, or some other special order and being able to locate materials easily that have been filed earlier.

Transcription

Using transcription machines to transcribe (write down) what the word originator has dictated. The transcriptionist usually uses the word processor in this activity.

Office Machines Operation

Operation of a variety of office machines, including typewriters, electronic calculators, photocopiers, computers, scanners, printers, and fax machines.

Public Relations

Meeting the public, arranging and setting up business meetings, making travel arrangements and schedules, etc.

Supervising other office employees

Coordinating other lower level office employees, delegating responsibilities, assuring that all tasks are being covered by the best-qualified worker, and mediating misunderstandings among these employees. As an office manager, the task of supervision becomes very important, as your employees' time and production is directly related to the overall function of the business.

Miscellaneous Duties

Performing any additional duties, as time permits, to assure the smooth operation of the business. This may include anything from touch-up housekeeping and manning the coffee pot to being left in total charge while the administrative support personnel's supervisor is away from the business.

COURSE: Exploring Business & Marketing

UNIT: Administrative Support

COMPETENCY: 7.00 Explain the functions of administrative support personnel.

OBJECTIVE: 7.03 Explain the use of computers by administrative support personnel.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Discuss the use of computers by administrative support personnel. Use the chalkboard or overhead to outline the major uses of computers by administrative support personnel.	Computers in the Office (D703-A1)
2. Demonstrate how computers can be used in the office by reading the scenarios found in the handout, "Computers in the Office: Do We Need Them?" As the first situation is read, ask students to write down the problems that the secretary is facing, using the answer sheet, "Computer Advantages." Allow the students to share answers with the class. Read the second scenario. Ask the students to write down the solutions that actually took place in this situation. Have them share answers with the class.	Computers in the Office: Do We Need Them? (D703-A2) Computer Advantages (D703-A3)
3. Take students to visit the school library or administrative offices and observe the use of computers in the school. Explain to the students that the school is a place of business and that the office workers are administrative support personnel. Have office personnel stage activities, if necessary.	Administrative Use of Computers at My School (D703-A4)

COMPUTERS IN THE OFFICE

Administrative support personnel use computers daily to assist with their duties. Since computers have entered into today's business office, the tasks of an administrative support personnel have been simplified. Various software packages that are used on the microcomputer have replaced the standard "pen-and-paper" way of doing things, decreasing the need for a typewriter.

Administrative support personnel must have a good working knowledge of both computer hardware and software. He/she may be called upon to do anything from enter data into the computer to troubleshoot problems with the system before calling for repairs. This person must have a knowledge of how computers can be networked together and communicate with each other. Administrative support personnel must be familiar with a variety of software packages. Some of the more popular types of applications are described in the following section.

Word Processing Software

Word processing software allows the user to type, edit, save, and print text. This software is used to type reports, letters, memos, etc. Among the most popular word processing software is *WordPerfect, Microsoft Word,* and *Appleworks*.

Spreadsheet Software

Spreadsheet software allows the user to enter statistical information into tables made up of rows and columns and calculate that information very quickly using formulas (without having to do the mathematics by hand). It is also capable of performing "what-if" analysis for forecasting or making projections of profits or losses. Spreadsheets are also used by administrative support personnel to do payroll, create budgets, etc. Two of the popular packages are *Lotus 1-2-3* and *Microsoft Excel*.

Database Software

Database software allows the user to store large lists of information and is capable of sorting that information into different categories. A business office may use this type of software to store client information, such as name, address, phone number, account number, etc. An example of database software is *dBase IV*.

Graphics Software

Graphics software allows the user to create pictures or graphics to aid in the presentation of information. Business offices may purchase "canned" graphics packages or create their own to be used on letterheads, reports, charts, displays, etc. Examples of these packages are *Print Shop, Microsoft Paintbrush, Deluxe Paint II, BannerMania* and *Print Power*.

COMPUTERS IN THE OFFICE: DO WE NEED THEM?
Sample Scenarios

Scenario #1:

It is 4 o'clock on Thursday afternoon. You just finished typing a difficult 40-page report that your boss must have for an important business meeting in the morning. There is just enough time to finish proofreading the final copy, photocopy 12 copies, and collate and staple the report before rushing off to your night class. Suddenly you are interrupted by the ringing of the telephone. Your boss has received some important information that absolutely must be added to the report. This means you will have to change a couple of words on at least half of the 40 pages of the report.

The figure 8,456 must be changed to the figure 9,876 and the name "Riley" must be changed to the name "Raleigh" throughout the entire report. Frantically, you go to work with your bottle of correction fluid, scissors, glue, and correction tape, but the problem turns out to be a big one. As hard as you try, you are unable to make the changes neatly enough so they won't be spotted when the pages are photocopied.

You reluctantly cancel your plans to attend night class and spend the next four hours retyping the report.

****

Scenario #2:

It is 4 o'clock on Thursday afternoon. Using your word processor, you just finished keying a difficult 40-page report that your boss must have for an important business meeting in the morning. As soon as you finished keying the document, you used the spell checker to assist you in proofreading the document, reviewed the document for other mistakes, and stored the document on disk. After proofreading the document, you print a hard copy of the report to be examined closely before printing the twelve copies needed. Suddenly you are interrupted by the ringing of the telephone. Your boss has received some important information that absolutely must be added to the report. This means you will have to change a couple of words on at least half of the 40 pages of the report.

The figure 8,456 must be changed to the figure 9,876 and the name "Riley" must be changed to the name "Raleigh" throughout the entire report. Calmly, you use the global "search and replace" command sequence to perform the changes. The computer automatically adjusts the space on each line and each page to accommodate the changes. When the changes are complete, the copy is saved again. You instruct the computer to print twelve copies of the report, decollate and staple them, and place them on your boss's desk. You still have to stop by the bank and make the company's deposit and make it to your night class on time.

COMPUTER ADVANTAGES

Directions: As your teacher reads a story (scenario) about an administrative office personnel, write down the problems that the worker is facing and some possible solutions. Be prepared to share your answers with the class.

Scenario #1:

Problems encountered:

_____
_____
_____
_____
_____
_____

Possible Solutions:

_____
_____
_____
_____
_____
_____

Directions: Listen to the second version of the story. What are the actual solutions that have been put into place in this office. List the improvements that resulted from purchasing the computer.

_____
_____
_____
_____
_____
_____

ADMINISTRATIVE USE OF COMPUTERS AT MY SCHOOL

Section A: List the people and places you observed in your tour of the school administrative offices. Be sure to note the position that they hold.

Name	Location	Position

What were some of the uses of computers that you observed in the school?

What are some suggestions you can make for using computers even further in your school? (Think hard!) Put these in a paragraph to be submitted to your principal.

COURSE: Exploring Business & Marketing

UNIT: Administrative Support

COMPETENCY: 8.00 Evaluate personal interests and aptitudes in pursuing a career in administrative support occupations and simulate typical problems.

OBJECTIVE: 8.01 Investigate the current opportunities in administrative support occupations.

TIME: 2 Class Periods (Continued on next page)

ACTIVITY	RESOURCES
1. After giving two or three examples of administrative support jobs in the office, give the students 5 minutes to complete the handout "How Many Administrative Support Occupations Can You List in Five Minutes?" Their answers will be used in Activity 2.	How Many Administrative Support Occupations Can You List in Five Minutes? (D801-A1)
2. Discuss the different types of administrative support occupations available in offices today, utilizing transparency D801-T1. Use the answers generated in Activity 1 to supplement the answers on the transparency.	Administrative Support Occupations (D801-T1)
3. Allow students to use reference books to look up as many administrative support occupations as they can find and write them down, along with their corresponding duties. NOTE: This information could later be typed into a database for future use in the classroom.	ASO Database Entries (D801-A2) **Reference Resources:** *Career Information Center* *Career Minibriefs* *Encyclopedia of Careers* *Occupational Outlook Handbook*
4. Design a bulletin board or posters listing administrative support occupations.	

D801 (Continued on the Next Page)

COURSE: Exploring Business & Marketing

UNIT: Administrative Support

COMPETENCY: 8.00 Evaluate personal interests and aptitudes in pursuing a career in administrative support occupations and simulate typical problems.

OBJECTIVE: 8.01 Investigate the current opportunities in administrative support occupations.

TIME: 2 Class Periods (Continued from previouos page)

ACTIVITY	RESOURCES
5. Have students interview an administrative support person using the ASO Interview sheet. Have them share the information with the class. Stress the importance of scheduling an appointment and of being pleasant to the interviewee. This is also an excellent time to talk about the proper dress of office workers. Ask students to dress appropriately when going on their interview.	ASO Interview Sheet (D801-A3)
6. Using the want ads section of a newspaper, have each student select one ad for an administrative support job. The handout, "Want Ad Analysis," should be used to help the student interpret the ad.	Want Ad Analysis (D801-A4) Local or state want ads

D801 (Concluded)

HOW MANY ADMINISTRATIVE SUPPORT OCCUPATIONS

CAN YOU LIST IN 5 MINUTES?

DIRECTIONS: During the next 5 minutes, list as many administrative support occupations as come to your mind. Do not begin until your teacher advises you. Keep your eyes on your own work!

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Total # Listed: _____

D801-A1

ADMINISTRATIVE SUPPORT OCCUPATIONS DATABASE ENTRIES

DIRECTIONS: Using one or more of the career references available in your classroom, look up as many administrative support occupations as you can find. Record the facts asked for (below) about each occupation. This information will be used in the next class discussion and will later be entered into the Classroom Occupational Database on the computer.

****Note: You will need index cards or 3" x 5" pieces of paper. Put one occupation on each card.**

Job Title: _____

Job Level: ***(List one) Entry Level/Supervisory/Management***

Duties: _____

Educational Requirements: _____

Other Comments: _____

Alphabetize your cards by Job Title. Write your name on the back of each card.

ADMINISTRATIVE SUPPORT OCCUPATIONS INTERVIEW GUIDE

Interviewer's Name: _____ *Date:* _____

Interviewee's Name and Job Title: _____

Business Name: _____

1. What are your major duties?

   _____

   _____

   _____

2. How long have you been employed by this business? _____

3. What were the educational/training and experience requirements for this job?

   _____

   _____

4. Is your work primarily indoors or outdoors? _____

5. How frequently do you deal with the public? _____

   _____

6. Do you supervise other employees? _____

7. What are some advantages of this job? _____

   _____

8. What are some disadvantages of this job? _____

   _____

9. Are there advancement possibilities? _____

10. What advice would you offer to my classmates and me concerning opportunities in and preparation for an administrative support occupation? _____

    _____

    _____

WANT AD ANALYSIS

Directions: **Cut out one want ad for an administrative support occupation from the newspaper. Paste the ad in the space provided below. Then answer these questions about the ad.**

1. What is the name of the job in the ad? _____

_____

2. What is the name of the business? _____

_____

3. What are the requirements for getting the job? (i.e., education, keyboarding skills, experience, etc.)

_____

_____

4. How do you apply for the job? (Call, write, or in person?)

_____

5. What is the phone number or address of the job?

_____

6. List additional information that is found in the ad:

_____

_____

[PASTE AD HERE]

Explain why you feel that this job would be good or bad for you.

_____

_____

_____

D801-A4

ADMINISTRATIVE SUPPORT OCCUPATIONS

TYPES	LEVEL
SECRETARY	
MAIL SORTER	
DATA ENTRY CLERK	
FILE CLERK	
RECEPTIONIST	
TELEPHONE OPERATOR	
SHIPPING AND RECEIVING CLERK	
CLERK TYPIST	
SALES ORDER CLERK	
OTHERS:	

REMEMBER THAT THE LEVEL ON WHICH THE JOB IS LISTED IS DIRECTLY RELATED TO EDUCATION AND EXPERIENCE. THE LEVEL ALSO DETERMINES THE PAY SCALE.

COURSE: Exploring Business & Marketing

UNIT: Administrative Support

COMPETENCY: 8.00 Evaluate personal interests and aptitudes in pursuing a career in administrative support occupations and simulate typical problems.

OBJECTIVE: 8.02 Assess the education, experience, and other requirements for administrative support occupations.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Use the handout entitled "Tree of Knowledge" to assess the education, experience, and other requirements for a career in administrative support. -- Allow students to choose an ASO of their choice to research.	Tree of Knowledge (Appendix)
2. Allow students to view a video or filmstrip on administrative support occupations.	Suggested video: *Careers in the 21st Century*

COURSE: Exploring Business & Marketing

UNIT: Administrative Support

COMPETENCY: 8.00 Evaluate personal interests and aptitudes in pursuing a career in administrative support occupations.

OBJECTIVE: 8.03 Simulate problems typical of administrative support occupations using appropriate technology, such as word processing, desktop publishing, graphics, and database software.

TIME: 7 Class Periods (Continued on the next page)

ACTIVITY	RESOURCES
1. Discuss the need to proofread carefully and the need to know proofreader's marks in order to work in an administrative support occupation. Point out that every document that leaves the office represents the total organization. Distribute the handout, "Proofreader's Marks," discuss the marks on the handout, and have the students complete the second half of the handout.	Proofreader's Marks (D803-A1)
2. Assign the letter entitled "Activity #2" to proofread. Students should use proofreader's marks to edit the paper. After marking corrections, have students type and print out the corrected version on the word processor.	Activity #2 (D803-A2 & D803-TK1)
3. Discuss the different styles of business letters. Illustrate on the overhead the layout of the various styles, using the letter in Activity #2 to show modified block style with mixed punctuation.	Teacher-prepared transparencies of block style vs. modified block style. D803-TK1 to illustrate modified block style, open punctuation.

D803 (Cont'd. on next page)

COURSE: Exploring Business & Marketing

UNIT: Administrative Support

COMPETENCY: 8.00 Evaluate personal interests and aptitudes in pursuing a career in administrative support occupations.

OBJECTIVE: 8.03 Simulate problems typical of administrative support occupations using appropriate technology, such as word processing, desktop publishing, graphics, and database software.

TIME: 7 Class Periods (Continued from the previous page)

ACTIVITY	RESOURCES
4. Review proper telephone techniques. Assign the three activities related to telephone usage listed in the next column.	Answering the Telephone (D803-A3) Taking a Message (D803-A4) Scheduling an Appointment (D803-A5)
5. Discuss the rules for indexing names of individuals, using the Records Management Information Sheet.	Records Management Information Sheet (D803-A6)
6. Assign the students the activity entitled "Indexing Names." If a typewriter is not available, the data may be handwritten on the index cards. After completing the activity as given on the handout, allow students to enter the data into a database program and use the appropriate command to sort the list. As closure, point out the fact that records management becomes much more efficient and faster when using a computerized database.	Indexing Names (D803-A7)

D803 (Cont'd. on next page)

COURSE: Exploring Business & Marketing

UNIT: Administrative Support

COMPETENCY: 8.00 Evaluate personal interests and aptitudes in pursuing a career in administrative support occupations.

OBJECTIVE: 8.03 Simulate problems typical of administrative support occupations using appropriate technology, such as word processing, desktop publishing, graphics, and database software.

TIME: 7 Class Periods (Continued from the previous page)

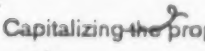
ACTIVITY	RESOURCES
7. Discuss with students the different types of office equipment available. Wherein possible, expose the students to this equipment through allowing them to use it briefly or showing them how you use it. Some suggestions are: * thermal master/transparency * spirit master * xerox copy * Risograph copy * Fax machine * mimeograph copy * calculators * other available technology * emerging technologies (you may have to use catalogs to demonstrate this, but it is necessary!	Calculating Purchases (D803-A8 & D803-TK2)

D803 (Concluded)

Proofreader's Marks

Mark	Meaning
	Insert
	Delete
	Add a space
	Close up space
	Capitalize
	Change the order
	Insert a comma
	Insert a period

Directions: Given the examples below of phrases with proofreader's marks, write the phrase in its corrected format.

Example	*Corrected Copy*
Keyboarding fun	Keyboarding is fun ***SAMPLE
Capitalizing ~~the~~ proper names 	_____
He miles	_____
In coming calls	_____
north Carolina	_____
Bus ess letters	_____
Atlanta Georgia	_____
available Finally,	_____

Activity #2

November20, 1992

Mr. David Covarrubias
Director of Media Specialists
Lake Placid Public Schools
114 Olympic Blvd.
Lake Placid CA 50066

Dear Mr. Covarrubias:

Thank you for your interest in our overhead projectors. We have several models that will fit the needs and wants of all the staff in Lake Placid.

Overhead projectors will save teachers time. In addition, the mess that is made when using the standard chalk and and chalkboard eliminated.

I am enclosing one of our sales bro chures. If you need additional information, you may call me at (919) 789-9987. I will be in Lake Placid on december 9. I hope be to talking with you then

Sincerely,

Serena Kenan
Sales Representative

Enclosure

Activity #2 (Teacher Key)

November 20, 1992

Mr. David Covarrubias
Director of Media Specialists
Lake Placid Public Schools
114 Olympic Blvd.
Lake Placid, CA 50066

Dear Mr. Covarrubias:

Thank you for your interest in our overhead projectors. We have several models that will fit the needs and wants of all the staff in Lake Placid.

Overhead projectors will save teachers time. In addition, the mess that is made when using the standard chalk and chalkboard is eliminated.

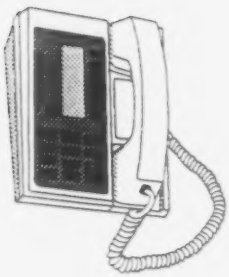
I am enclosing one of our sales brochures. If you need additional information, you may call me at (919) 789-9987. I will be in Lake Placid on December 9. I hope to be talking with you then.

Sincerely,

Serena Kenan
Sales Representative

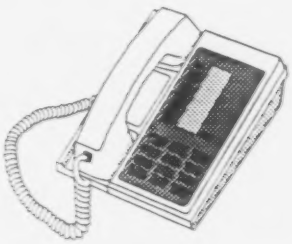
Enclosure

ANSWERING THE TELEPHONE



As you arrive at work at 7:50, the telephone rings. Show how you would answer the telephone and what you would say during the conversation by placing a check in the blanks provided.

The telephone rings....



You: Good morning. WRIL Radio Broadcasting.

You: _____ Hello.

or _____ Good morning. WRIL Radio and Broadcasting.

Caller: This is Sarah Brown. May I speak to Tim Baker?

You: _____ I'm sorry. Mr. Baker will not be in until 9:00 a.m.

or _____ He's not here.

Caller: I am supposed to meet with him this morning, but I don't remember what time. Can you tell me when I'm expected? I may need to change our meeting to this afternoon.

You check Mr. Baker's calendar....

You: _____ We was expecting you at 9:30 a.m.

or _____ We were expecting you at 9:30 a.m., but Mr. Baker could see you at 3:30 this afternoon, if you prefer.

Caller: Just leave it as it is. Nine-thirty is okay.

You: _____ Fine. We will see you at 9:30 as scheduled.

or _____ OK. See ya later.

Caller: Thank you very much for your time. Goodbye.

TAKING A MESSAGE

The telephone rings at ten minutes after eight in the morning. You answer the phone and the conversation goes as follows:

You: Good morning, WRIL Radio Broadcasting.

Caller: This is McKeel over at Super Productions Corporation. Let me speak to Rhonda Lee, please.

You: I'm sorry. Ms. Lee will not be in her office until 9:00 this morning. May I take a message or have her return your call, Mr. McKeel?

Caller: Just tell her I called to say that Buck Allen doesn't have the new contract ready, but he will have it ready tomorrow morning.

You: I'll give her the message as soon as she comes in. May I have your telephone number in case Ms. Lee needs to contact you?

Caller: Yes. It's 789-5543.

You: That's 789-5543?

Caller: Right!

You: Thank you, Mr. McKeel. I'll give Ms. Lee your message.

Caller: Okay! Thanks! Goodbye.

Based on your conversation with Mr. McKeel, fill in the following telephone message form, which will be given to Ms. Lee when she arrives at the office.

PHONE-O-GRAM for: _____

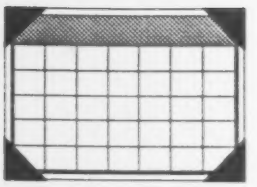
M_____ of _____

[ ] Telephoned [ ] Please return the call
[ ] Will call again [ ] Came in [ ] See me

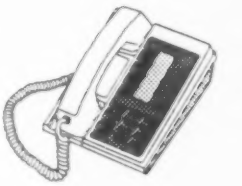
Message:

Phone: _____ Date: _____ Time: _____
By: _____

SCHEDULING AN APPOINTMENT



The telephone rings and a man named Earl Thomas asks to make an appointment to see Mr. Lacy this afternoon. Review the conversation below and do whatever is necessary.



You: Good morning. WRIL Radio Broadcasting.

Caller: This is Earl Thomas of the *Star Press*. Mr. Lacy asked me to stop by to talk with him sometime this week. I am free this afternoon and would like to make an appointment to see him as soon after one o'clock as possible.

(You look at the calendar to see when Mr. Lacy is free.)

You: Mr. Lacy is free at 2:30 this afternoon. Would that be a convenient time for you?

Caller: Yes, that would be fine.

(You start to write in the appointment, but Mr. Thomas continues:)

Caller: Wait a moment. I just remembered I have another appointment at 2:00 this afternoon that will last about 35 minutes. Can I still get in to see Mr. Lacy?

(Check which of the following answers you would give to Mr. Thomas and be prepared to explain your answer.)

You: _____ It don't matter when you get here because Mr. Lacy is free until 3:30.

_____ Yes, Mr. Thomas. I'll make an appointment for you at _____ p.m.

(Write Mr. Thomas's name and company on the appointment calendar.)

DAILY APPOINTMENT CALENDAR FOR MR. ALLEN LACY

8:00	_____	12:30	Lunch
8:30	_____	1:00	Lunch
9:00	Jane Atkins/WXBY	1:30	Lunch
9:30	_____	2:00	Mr. Lewis/Aspen Prod.
10:00	Conf. w/Announcer	2:30	_____
10:30	Conf. w/Announcer	3:00	_____
11:00	_____	3:30	Randy Bowen/Actor's Gld
11:30	_____	4:00	_____
12:00	Lunch at Civic Club	4:30	Alice Payne/Contract

Alphabetic Indexing for Personal Names

1. Order of Indexing Units

Each word and each initial or abbreviation in a name is a separate indexing unit. The units of an individual's name are considered in this order: (a) last name, or surname; (b) first name, initial, or abbreviation; and (c) middle name, initial, or abbreviation. Thus, in the name, Karen A. Austin, there are three indexing units: Austin is the first indexing unit; Karen is the second; and A. is the third.

Names	**Unit 1**	**Unit 2**	**Unit 3**
Karen A. Austin	Austin	Karen	A.
Kevin Allen Brown	Brown	Kevin	Allen

2. Last Names

When the last names of individuals are different, the alphabetic order is determined by the last names alone. The letter that determines the order of any two names is the first letter that is different in the two names.

Last Names

James
Jones
Kenan
Kennedy

3. Last Names Containing Particles or Articles

A last name containing a foreign particle or article is considered an indexing unit. It is treated like any other last name.

Last Names

D'Aaron
Del Covarr
du Pont
McDonald
O'Brien
Van Heusen
Von Sneider

4. Compound Last Names

Compound last names are indexed as two separate units. When the compound name is hyphenated, the hyphen is ignored. In a compound last name, such as *St. Andrews*, *St.* is considered to be the first unit (in spelled-out form as Saint) and *Andrew*, the second unit.

Names	**Unit 1**	**Unit 2**	**Unit 3**
Mary St. Matthews	Saint	Matthews	Mary
Pedro San Diego	San	Diego	Pedro
Mary Smith-Harris	Smith	Harris	Mary

5. First Names

When last names match, work with the first names. When first names match, then work with the middle name. When the full names are identical, parts of the address are used to determine the filing order. The order in which parts of addresses are used for determining the alphabetic order is as follows: (a) town or city name; (b) state name; (c) street name; and (d) house number (in numeric order).

David E. Smith	David E. Smith	David E. Smith
123 Martin Road	456 Kerry Smith	452 East Avenue
Jacksonville, FL	Kannapolis, NC	Kannapolis, TN

D803-A6 (Cont'd. on Next Page)

6. Initials and Abbreviated First or Middle Names

A first initial is considered an indexing unit. It goes before all other names that begin with the same letter. An abbreviated first or middle name *(Wm. for William)* is usually treated as if it were spelled in full. Nicknames *(Bob for Robert)* are indexed as written.

Names	Unit 1	Unit 2	Unit 3
K. Samuel Smith	Smith	K.	Samuel
Kevin Samuel Smith	Smith	Kevin	Samuel
Bob Taylor	Taylor	Bob	
Robert Taylor	Taylor	Robert	

7. Unusual Names

When you can't decide which part of a name is the last name, the last part of the name as written should be considered the last name.

Names	Unit 1	Unit 2	Unit 3
Yen Kan Shu	Shu	Yen	Kan

8. Seniority in Identical Names

A term indicating seniority, such as *Senior, Junior, II,* and *III* can be used in determining the alphabetic order for filing purposes. The titles *Junior* and *Senior* are arranged in alphabetic order. The titles *I, II,* and *III* are arranged in numeric order.

Names	Unit 1	Unit 2	Unit 3
Robert Olsen	Olsen	Robert	
Robert Olsen, Jr.	Olsen	Robert	Junior
Robert Olsen, Sr.	Olsen	Robert	Senior
Jim Smith II	Smith	Jim	II
Jim Smith III	Smith	Jim	III

9. Titles and Degrees

A personal or professional title or degree is usually not considered in filing, but is put in parentheses at the end of the name. When a religious title *(Father)* or a foreign title *(King, Queen)* is followed by only a first name, it is indexed as written with the title as unit one.

Name	Unit 1	Unit 2
King Ferdinando	King	Ferdinando
Princess Grace	Princess	Grace

10. Names of Married Women

A married woman's name is filed according to the way she writes it. Follow the same indexing rules. The title *Mrs.* or *Ms.* is put in parentheses after the last indexing unit, but is not considered in filing.

Name	Unit 1	Unit 2	Unit 3
Mrs. Nancy Harris	Harris	Nancy	(Mrs.)
Ms. Susie Smithson	Smithson	Susie	(Ms.)

Note: For situations that do not fall in these categories, consult your reference manual for additional indexing rules.

INDEXING NAMES

Directions: To complete the following activity, you will need twenty-five 3" x 5" index cards. Complete the following steps:

1. Type or write each of the following names in index form in the upper left corner of an index card.
2. Type or write the number of each name in the upper right corner of the card.
3. After you have properly indexed and recorded the names and numbers on the cards, arrange the cards in alphabetic order.
4. Copy the names and numbers on a sheet of paper in the order in which you have arranged the cards in Step 3.
5. If time permits, enter the names given above in the database in the computer. Have the computer sort and print the names in alphabetic order. Compare your answers to the computer printout.

1. Dr. Helen G. Hollaren
2. Salbinto L'Bento
3. Jim Newman
4. Sara N. Sallen
5. Mrs. Adeline A. Kennedy
6. Mrs. Minnie Brinson
7. Karen Atkinson Evans
8. Leonard K. Kearns
9. Thomas F. Corey
10. LeRoy Edwards
11. Fanny Sue Candelton
12. Clyde A. Lowrey, Jr.
13. King Richard
14. Hedda M. Kaufmann
15. Greg Mobley
16. Vinny Zannduo
17. Maryalice Corey
18. Princess Grace
19. Susan St. Johns
20. Anne Su Yew
21. Mitch Anderson-Smith
22. Terry Van Buren
23. Andrew Sallen
24. B. B. Loucks
25. John Mills

CALCULATING PURCHASES

Directions: If calculators are available to you, use one of the machines to do the following problem. If they are not available, calculate the problem manually.

Sold To: Riley Imports, Ltd.
1234 W. 45th Street
Jacksonville, NC 27783

Purchased From: Ace Office Supply Company
1400 Western Boulevard
Jacksonville, NC 27783

QUANTITY	ITEM	PRICE PER ITEM	TOTAL PRICE
22 boxes	Paper clips	$ .72/box	$_____
7 boxes	Duplicating paper	$4.80/box	_____
2 boxes	Carbon paper	$3.95/box	_____
6 boxes	Legal envelopes	$2.50/box	_____
50 each	Pencils	$ .22/each	_____
10 each	Typewriter ribbons	$2.70/each	_____
		Subtotal	_____
		Sales Tax (6%)	_____
		Total Price	_____

CALCULATING PURCHASES

Directions: If calculators are available to you, use one of the machines to do the following problem. If they are not available, calculate the problem manually.

Sold To: Riley Imports, Ltd.
1234 W. 45th Street
Jacksonville, NC 27783

Purchased From: Ace Office Supply Company
1400 Western Boulevard
Jacksonville, NC 27783

QUANTITY	ITEM	PRICE PER ITEM	TOTAL PRICE
22 boxes	Paper clips	$ .72/box	$ 15.84
7 boxes	Duplicating paper	$4.80/box	33.60
2 boxes	Carbon paper	$3.95/box	7.90
6 boxes	Legal envelopes	$2.50/box	15.00
50 each	Pencils	$ .22/each	11.00
10 each	Typewriter ribbons	$2.70/each	27.00
		Subtotal	110.34
		Sales Tax (6%)	6.62
		Total Price	$ 116.96

COURSE: Exploring Business & Marketing

UNIT: Administrative Support

COMPETENCY: 8.00 Evaluate personal interests and aptitudes in pursuing a career in administrative support occupations and simulate typical problems.

OBJECTIVE: 8.04 Evaluate personal options in pursuing a career in an administrative support occupation.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Use the "Tree of Knowledge" handout to record the unit name and a related career.	Tree of Knowledge--Appendix
2. Use the handout entitled "Is This Career Right For You?" for students to evaluate personal options when pursuing a career in administrative support.	Is This Career Right For You?--Appendix

Exploring Business and Marketing

Unit E:

Marketing

COURSE: Exploring Business & Marketing

UNIT: Marketing

COMPETENCY: 9.00 Explain the role of marketing in the economy.

OBJECTIVE: 9.01 Explain the role and importance of marketing in a free enterprise system.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Define "marketing."	Marketing Information Sheet (E901-A1)
2. Explain the impact of the free enterprise system on marketing practices.	Marketing Information Sheet (E901-A1)
3. Explain marketing mix and the Four P's of Marketing.	Marketing Information Sheet (E901-A2)
4. Using small groups, have students design a marketing survey to enter on the computer, duplicate, distribute to fellow students and/or family members, compile results, and present findings to the class later in the unit.	Teacher directed
5. Have students complete "The Hidden Word Game."	The Hidden Word Game (E901-A3)

MARKETING INFORMATION SHEET

** Marketing is defined as satisfying the needs and wants of the consumer through the exchange process, meaning that customers pay money for goods and services.

** In studying the five freedoms of a free enterprise system, you should know that:

--you are free to own private property and do with it what you wish. You can sell it, rent it, or do nothing with it.

--you are free to open and update your own business.

--you are free to compete with other businesses in order to be successful. You can raise or lower prices and introduce new and different products to entice customers. Competition is an essential part of the free enterprise system. It forces businesses to produce better goods and services at lower prices.

--you must make a profit in your business in order to be successful. Profit is a driving force in a market economy. It encourages businesses to be efficient and to cater to the consumer. However, freedom to make a profit does not guarantee that it will happen. There is risk of failure. Studies show that <u>one</u> business out of <u>three</u> in the U. S. fails in the first year. Profit may be defined as the money a business has brought in after costs and expenses of running the business have been subtracted.

--you have many choices in a free enterprise system. You may choose the product and services that you want to buy, the careers you want to pursue, and the people by whom you wish to be represented in government.

MARKETING INFORMATION SHEET

** Marketing mix may be defined as a combination of decisions about product, place, price, and promotion.

Product: involves what to make, when to make it, the level of the product quality, how many of the product to produce and sell, how to package it, the brand name to give it, and the warranties to issue with it, if any.

Place: involves deciding where to distribute the product and whether to sell directly to the consumers or to sell only to wholesalers and/or retailers.

Pricing: is extremely important because you must decide what prices consumers are willing to pay for the product. Things to consider include the price at which competitors are offering the same or a similar product and the income of the target group. For example, if you were targeting a high income group, your pricing would be higher than if you were targeting middle school and high school students.

Promotion: involves deciding how you are going to let consumers know about your product. You must decide which media resource to use--radio, newspaper, TV, etc.--to reach your target market. You must also decide when to advertise and how frequently to advertise. You must set aside an advertising budget and include the cost of advertising in the price of your product.

NOTE: The 4 P's cannot be separated in the marketing decision-making process!

HIDDEN WORD GAME

Directions: Ten marketing terms are hidden in the diagram below. Your job is to find them and circle them. Check off each word from the word list when you find it.

wholesaling	distribution
retailing	producer
consumer	advertising
warehouse	buyer
salesperson	marketing

D O D P S T R G T G L M N O P S R R V R
C W A R E H O U S E V L R I N T X T E C
L H E P S T R B A G L M N O P S R Y D B
E O F O Z Y O K L M K N T O V R U P I B
P L V T N G X Y E K E Q I T P B Q H S F
S E T R I N F R S E T S N J S R X W T E
B S Z Z S O L N P W I P R O D U C E R I
R A N C L X C L E C N O N O T T U H I D
N L L O Z I M A R K E T I N G R K H B I
Z I T N K P N O S T I N Z Y L S L M U E
V N S S S L C N O X C E T P X R T P T R
W G R U R L H R N H E T X N G P R D I F
X T M M N R K E N D H I B P P P I R O L
M R M E K S L O R A C T U V L L E S N O
B V D R E T A I L I N G G L N O V O U L
I T O N B P U G J L P V J R G P I S V P
Z K R L M O T A D V E R T I S I N G R Y
E J Q O E T E V W M E S D T C S G T V G

COURSE: Exploring Business & Marketing

UNIT: Marketing

COMPETENCY: 9.00 Explain the role of marketing in the economy.

OBJECTIVE: 9.02 Explain the marketing functions.

TIME: 2 Class Periods

ACTIVITY	RESOURCES
1. Discuss the nine marketing functions, their importance, and give examples of each.	Marketing Functions Information Sheet (E902-A1)
2. Have students roleplay one of the marketing functions by posing questions.	Teacher Directed
3. Have students complete the handout entitled "Name that Marketing Function" to enhance student knowledge of the marketing functions.	Name that Marketing Function (E902-A2)
4. Have students complete the word find entitled "Functions of Marketing."	Functions of Marketing Word Find (E902-A3)

INFORMATION SHEET: MARKETING FUNCTIONS

There are nine marketing functions. All of them work together to get goods and services from the producer to the consumer. Each function depends on the others, and each is needed to market goods and services successfully. These functions are as follows:

1. Distribution--the movement of goods and services from the producer to the consumer. Activities include transporting, storing, managing, inventorying, and receiving.

2. Financing--determines the financial resources to aid in marketing activities. Activities involve handling and recording all monies, managing credit transactions, and budgeting.

3. Marketing/Information Management--develops the procedures and methods for gathering, analyzing, and disseminating information that has been collected through marketing research.

4. Pricing--determining the amount to charge a customer for a product or a service. Pricing involves considering how much a customer is willing to pay for the quality level of product or service being offered as well as being aware of what the competition is offering and the price they have chosen for the same or a similar product or service.

5. Product/Service Planning--involves developing a product or service in response to marketing opportunities. Business owners must decide what combinations of products the company will produce. This can vary based on the needs and wants of customers.

6. Promotion--the communication of information about products, services, images, or ideas to the customer. The customer can be informed by advertising, publicity, or sales promotions.

7. Purchasing--involves the planning and procedures necessary to obtain goods and services for use in the operation of a business or for resale. Involves determining needs and choosing suppliers from which to get the goods.

8. Risk Management--involves planning, controlling, preventing, and other procedures used by management to limit business losses. Also involves buying insurance and training employees about safety procedures, employee theft detection, and shoplifting prevention and detection.

9. Selling--involves responding to consumer needs and wants through planned, personalized communications intended to influence purchasing decisions. Also involves the establishment of relationships with customers, discovering customer needs, and identifying products to meet needs.

Some of the factors that affect price are: the cost of producing the item, the desired profit margin, the demand for the product, and the pricing policy of competitors.

Each marketing function is important. If one is not performed well, the other functions will not be effective. When each function is well planned and properly completed, the result should be satisfied customers and a profitable business.

NAME THAT MARKETING FUNCTION

Directions: Using the blanks provided, identify the marketing function that is illustrated. A list of the nine marketing functions is given below.

distribution	financing
marketing/information management	pricing
product/service planning	promotion
purchasing	risk management
selling	

_____ 1. Newspaper article on the grand opening of a new store.

_____ 2. Styles of blue jeans are selected to be sold in a department store.

_____ 3. Money is borrowed to purchase additional stock for the winter season.

_____ 4. A consumer answers survey questions after trying a new food product.

_____ 5. A salesperson answers a question about the operation of a clock radio.

_____ 6. Sleds are stored in a warehouse until time to sell them.

_____ 7. Insurance is purchased to guard against fire, shoplifting, and accidents.

_____ 8. Management of a fast-food restaurant adds a dinner menu.

_____ 9. Tennis shoes sold in a department store has a mark-up of 20 percent, based on cost.

_____ 10. Management decides how much money to give each department.

_____ 11. Employees are trained to handle emergency situations.

_____ 12. Management has decided to use magazine ads rather than television commercials.

_____ 13. Arrangements have been made for the delivery of new merchandise.

_____ 14. Materials used in production were shipped by plane to the company.

_____ 15. A stereo was marked down 20 percent.

FUNCTIONS OF MARKETING

Directions: Eighteen words relating to marketing functions are listed below. Your job is to find them and circle them. Check off each word from the word list when you find it.

information	promotions	management
financing	marketing	insurance
consumers	function	planning
selling	display	pricing
changes	product	margin
value	risk	life

B U S R V D R D X Q G X G D X I O Q

S P E T G E T T B Q Q N V L C Y D G

U R L H I S J W Y H O N Z R H W M X

L O L Q Y W P R I C I N G U Q W A M

I D I N S U R A N C E D R J H J Q G

F U N C T I O N A C N M Q A J E I D

E C G B R U M J K B J C B G F I U G

N T C P A U O M U L M E P A G D C K

J U Z L W N T A R C A D L A R B S U

L Q W S P H I N F O R M A T I O N N

W T P B G H O A I N K P N F S L P Q

N T J C G H N G N S E L N O K F T O

C H A N G E S E A U T D I S P L A Y

N W W T X S N M N M I W N I D Y N T

V T T V A L U E C E N A G P X X X W

T J C S Q L J N I R G N I F I S V L

L L L A Q I Y T N S G G B A Y R E S

W R X S R M A R G I N R D J Q N L J

ANSWER KEY FOR
NAME THAT MARKETING FUNCTION
(A902-A2)

1. promotion
2. purchasing
3. financing
4. marketing/information management
5. selling
6. distribution
7. risk management
8. product/service planning
9. pricing
10. financing
11. risk management
12. promotion
13. purchasing
14. distribution
15. pricing

COURSE: Exploring Business & Marketing

UNIT: Marketing

COMPETENCY: 9.00 Explain the role of marketing in the economy.

OBJECTIVE: 9.03 Explain the use of computers in marketing.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Discuss and describe the importance of computers in marketing.	Computers in Marketing (E903-A1)
2. Discuss and demonstrate to the class the common computer applications in marketing.	Computers in Marketing (E903-A1)
3. Discuss and describe computer skills that are useful in marketing.	Computers in Marketing (E903-A1)
4. Have students contact a business in your area that uses computers and interview the owner or the manager to find out how they utilize the computer in the business. How do they anticipate increasing computer usage in the future?	Interview Sheet (E903-A2)

COMPUTERS IN MARKETING INFORMATION SHEET

I. THE IMPORTANCE OF COMPUTERS IN MARKETING

Computers are used in almost every aspect of business. A computer has become essential in the marketing field, due to its versatility. People in marketing use computers for:

- conducting marketing research
- following consumer trends
- keeping inventories
- ordering merchandise
- monitoring customer transactions
- analyzing customer sales
- analyzing relocation/expansion information

II. COMMON COMPUTER APPLICATIONS FOR MARKETING

Computer applications in marketing are essential for using the computer for a variety of things ranging from developing computer simulations for a new product to inventory management. A lot of marketing managers use a system called **MIS (Management Information System)** to integrate or combine the following computer applications:

- Telemarketing
- Marketing Research
- Sales Territory Management
- Inventory Control
- Distribution Management
- Product Development

Given below are some definitions of terms that are part of the computerized marketing vocabulary.

Telemarketing--the process of completing sales transactions over the phone. This system is also used to send order information directly to the shipping department.

Marketing Research--is a database that helps retrieve data for statistical analysis, thereby making information in surveys and research easier to analyze and use.

Sales Territory Management--the usage of computer networking that enables marketing managers to keep in close contact with their sales force. Salespersons can give presentations to the customers by using a laptop computer to show them technical detail about a product.

E903-A1 (Continued on the next page)

Inventory Control--is used to help business keep a close watch on the products in stock as well as turnovers of these products. This system also keeps a watch on the work of the checkout clerks and assists in tracking damaged goods and shoplifting.

Distribution Management--is responsible for following products from the manufacturer to the retailers. It can also determine the needs and problems in distribution. Computers are used to track important data about what products are "hot" and which ones are just occupying space on the shelf.

Product Development--is made easier by the use of computer simulations to aid research and development departments in creating new products without physically touching them or having to create many samples before coming up with the desired design.

III. COMPUTER SKILLS FOR MARKETING

Word Processing--is probably the most popular software program used with computers. People in marketing use this to create letters, memos, and reports. In order to do this efficiently, both keyboarding skills and a working knowledge of word processing are necessary.

Spreadsheet--is a software program that helps the user create reports that summarize business information. The user enters the figures and the spreadsheet program performs the calculations. This is very useful in projecting sales and forecasting profits.

Database--allows the user to organize information that has similar characteristics such as customer lists or product information. A person must know how to retrieve and manipulate the information stored in the database. This is critical to many marketing decisions.

File Integration Package--is a software program that has the ability to transfer files from one application to another. There are two main types of these programs: one which contains all of the above types of programs within the same package and a group of programs that are interactive with each other. The integrated all-in-one package is not as powerful as are the stand-alone/compatible packages. The decision as to which one to purchase usually depends on the size of the company using the programs.

COMPUTERS IN MARKETING INTERVIEW SHEET

Directions: Use these questions as a guide for helping you conduct a successful interview of a local businessperson concerning computer usage in marketing. Summarize the answers in a written report to be shared with the class.

1. What types of computers do you use in your business?

2. What is the main use of computers in your business?

3. Does your company use the computer for word processing, spreadsheets, database, graphics, other applications, or a combination of the above?

4. Are your computers networked with other computers? If yes, what types of information do you transfer?

5. Which of the following computer applications do you use and why?

   a. telemarketing--

   b. marketing research--

   c. inventory control--

   d. product development--

6. Other than the ones mentioned, do you use other product applications?

7. How can we best prepare for a career in marketing?

COURSE: Exploring Business & Marketing

UNIT: Marketing

COMPETENCY: 10.00 Evaluate personal interests and aptitudes in pursuing a career in marketing and simulate related activities.

OBJECTIVE: 10.01 Investigate the current career opportunities in marketing.

TIME: 2 Class Periods

ACTIVITY	RESOURCES
1. Give students a list of careers that come under marketing. From the list, have them choose one and find information about that career.	Careers in Marketing (E1001-A1)
2. Have students interview a person who is currently working in a marketing career.	Interview Guide (E1001-A2)
3. Have students check the want ads in the local newspaper to determine the availability of marketing jobs in the local community.	Local and/or regional want ad section
4. Invite a counselor to speak to your class about courses to take in high school that will prepare them for a career in marketing.	

CAREERS IN MARKETING

DIRECTIONS: Listed below are several careers in marketing. Choose one of these careers to investigate, using the occupational resources available in your class.

- CASHIER
- COMPUTER CLERK
- INSURANCE SALES WORKER
- REAL ESTATE AGENT
- RETAIL SALES WORKER
- TRAVEL AGENT
- WHOLESALE TRADE WORKER
- FINANCIAL SALES REPRESENTATIVE
- ADVERTISING/MARKETING RESEARCH ANALYST
- PURCHASING AGENT
- STORE MANAGER TRAINEE
- CREDIT WORKER
- MANUFACTURER'S SALES WORKER
- AUTOMOBILE SALES WORKER
- STOCK CLERK

INTERVIEW GUIDE

1. What are your main duties or responsibilities in your job?

2. How long have you been working at this job?

3. What courses did you take in high school that were helpful to you when you started this job?

4. Will I be able to get a job in this field with a high school education or will I need a college degree?

5. Will I be able to advance in this job to higher positions?

6. What are some of the personal characteristics that would be helpful to a person in this job?

7. What do you like best about your job?

8. What do you like least about your job?

COURSE:	**Exploring Business & Marketing**	
UNIT:	**Marketing**	
COMPETENCY:	**10.00**	**Evaluate personal interests and aptitudes in pursuing a career in marketing and simulate related activities.**
OBJECTIVE:	**10.02**	**Assess the education, experience and other requirements for marketing occupations.**
TIME:	**1 Class Period**	

ACTIVITY	RESOURCES
1. Use the handout entitled "Tree of Knowledge" to assess the education and other requirements for a job in marketing.	Tree of Knowledge (See Appendix)
2. Invite someone in the field of marketing to explain benefits that could result from pursuing a career in marketing.	Guest Speaker

COURSE: Exploring Business & Marketing

UNIT: Marketing

COMPETENCY: 10.00 Evaluate personal interests and aptitudes in pursuing a career in marketing and simulate related activities.

OBJECTIVE: 10.03 Simulate activities typical in marketing occupations using appropriate technology, such as word processing, graphics, database, desktop publishing, computer simulations, multimedia, and electronic equipment.

TIME: 7 Class Periods (Continued on the next page)

ACTIVITY	RESOURCES
1. Using the information in the Advertising Agency Assignment sheet, explain company logos and advertising campaigns. The students will be creating a media campaign. It may be more effective for the students to work in small teams of 3 or 4 students. If possible, videotape the commercials and have the students rate the videos for effectiveness. (Note: An alternative or extra assignment would be to have the students decide on the product--real or fictitious--and design their campaign around that product.)	Advertising Agency Assignment (E1003-A1)
2. Take the students to a local department store or invite a window designer from a local store to speak to the students about window design. Using art paper, have the students to create a window display for a store. If you have the equipment or an area available in your school, you may be able to actually have the students set up the display.	Create a Window Display (E1003-A2)

COURSE: Exploring Business & Marketing

UNIT: Marketing

COMPETENCY: 10.00 **Evaluate personal interests and aptitudes in pursuing a career in marketing and simulate related activities.**

OBJECTIVE: 10.03 **Simulate activities typical in marketing occupations using appropriate technology, such as word processing, graphics, database, desktop publishing, computer simulations, multimedia, and electronic equipment.**

TIME: 7 Class Periods (Continued on the next page)

ACTIVITY	RESOURCES
3. Have students create a news release on the word processor or typewriter. Also, have the students write an article to submit to the school newspaper.	Create a News Release (E1003-A3)
4. Using their knowledge of database entry, have students enter the potential customer list in the computer and print the required reports.	Potential Client List (E1003-A4)
5. Have students design a student information form, collect data from classmates, enter the data, and print the required reports.	Student Data Listing (E1003-A5)
6. Using the information and instructions in the Cost Comparison/Purchasing Activity Sheet, have student complete the comparison sheet and purchase orders. (Note: Each student will need **four (4)** copies of the purchase order.)	Cost Comparison/Purchasing Activity (E1003-A6 and E1003-TK1)
7. Set up a grocery corner in your room, complete with bags. Have students complete "A Day at the Supermarket."	A Day at the Supermarket (E1003-A7)

ADVERTISING AGENCY ASSIGNMENT

Logos are symbols which identify a product or a company. A logo may be

- a picture
- a design
- a number or numbers
- a letter or letters
  or
- any combination of the above.

The owners of The Computer Supermarket have come to your advertising agency to have you design a logo for the company and create a media coverage campaign to announce the grand opening of their store. The owners have an unlimited budget.

They have provided you with the following information to help you with the advertising:

- The store is located in the Research Triangle Park.
- The store hours are 9:00 a.m. until 10:00 p.m.
- The sales staff is well trained and knowledgeable in the use of computers and related software.
- There is ample parking at the store.
- The grand opening date is January 1 of the current year.
- The grand opening sale will last for one week.
- There will be a 10% discount on all items.
- A drawing will be held daily for a free piece of computer equipment.
- The theme of the store is "User Friendly."

Your job is to create a logo and a media coverage campaign to announce the grand opening of the computer supermarket. These ads will be placed on national channels during the evening prime time hours. Your target market is primarily middle income households who either are looking for their first computer system, want to upgrade their existing system, or purchase new software.

There are a number of points to remember.

- You have only 30 seconds to relay your message.
- You should create a posterboard to display your advertising idea.
- The ad should contain a visual demonstration of a product.
- Remember the ad theme!
- Stress the name and location of the store.
- Stress the price discount.
- Don't forget the logo!

CREATE A WINDOW DISPLAY

Window displays are designed to attract attention so that shoppers will come into the store. The manager of Belk's Department Store has asked you to do a window display for their back-to-school fashions.

The manager has provided you with the following information:

- The store is located in Tiger's Mall.
- The display will target teenagers age 13-19.
- Your target market is all levels of income.
- Your merchandise will be jeans, sweaters, shirts, sneakers, and leather jackets.

Your job is to design this window display on a piece of posterboard or art paper. You want to make it an attractive and eye-catching display. You may draw your pictures for the display, you may cut them out of magazines or newspapers, or you may design them on the computer if you have clip art available that is suitable.

Use the area below to plan your display before you begin the actual layout.

CREATE A NEWS RELEASE

A news release is a written article that describes a special event that is being sponsored by someone. In your news release, include the following information:

- a headline.
- the name of the business or organization.
- the name of the person who prepared it.
- when it is to be printed by the media.
- the five "W's" of news writing: Who, What, When, Where, and Why or How.

The specific information to be used in your article is described below.

- Mr. John Prescott will be attending a training seminar in Chicago two weeks from today's date.
- The name of the seminar in which he will be participating is "Better Business Through Better Customer Relations."
- Two hundred other corporate representatives will be attending.
- Mr. Prescott has been employed by The Boston Advertising Agency in Boston, Massachusetts, for 9 years.
- Mr. Prescott is the Vice President for Customer Relations.
- Mr. Prescott is the husband of Marilyn Prescott and the father of two children, Renee and Randy.
- The Boston Advertising Agency serves over 2,500 customers in seventeen states on the East Coast.

Note: Organize your material logically. Use short- or medium-length sentences. Use the word processor to type your final draft of the article.

POTENTIAL CLIENT LIST

Create a database of potential clients for your company. Print an alphabetical listing of all the clients. Then print a alphabetical listing of those clients living in North Carolina.

Dr. & Mrs. John Smith
669 Allen Street
Savannah, GA 31401

Ms. Liz Townes
200 Rhode Avenue
Kinston, NC 28501

Mrs. Ada Johnson
155 Forest Lane
Albany, GA 31707

Mr. Chuck Harris
728 Sanders Street
Raleigh, NC 27610

Miss Sara Cato
215 Main Street
Arlington, VA 23701

Mr. & Mrs. Lawrence Drew
800 Morgan Street
New Bern, NC 28526

STUDENT DATA LISTING

Schools often create a database of all the students in the school. This enables them to quickly access addresses, birth dates, and other important information.

Create a database of all the students in your business and marketing class. Include the following information:

- Student name.
- Address.
- City, State, and Zip Code.
- Telephone number.
- Date of birth.
- Parents' names.
- Favorite food.
- Favorite sport.
- (Other "favorite" categories may be included if you wish.)

First, use the word processor to create an information form to gather data for your database. Have the students in the class to answer the questions. Then, input the data into the database.

From the database, print two reports. In the first report, print the data for all students arranged by birth date. In the second report, print only the students who prefer pizza.

COST COMPARISON/PURCHASING ACTIVITY

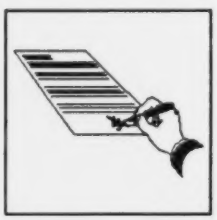
You are a purchasing agent for your school system. As a purchasing agent, your job is to purchase goods for the school system for the lowest possible price and from reliable vendors (sellers).

Several schools in your system have submitted requests and you need to purchase the following items:

- 25 Electronic Typewriters,
- 25 Typewriter Ribbons,
- 5 MacIntosh Computers with Printer,
- 10 Calculators,
- 3 Boxes of Computer Paper, and
- 10 Boxes of Diskettes.

You need to decide which company has the best prices. You have been provided with a list of vendors and prices from each vendor. Fill in the price comparison chart provided. Decide from which vendors you can purchase most economically.

Complete the purchase orders, doing price extensions (multiplying quantity times price per item), subtotaling the entire order, figuring shipping and handling, figuring sales tax, and totaling the entire order. Remember, when figuring handling and sales tax, you will multiply the percentage by the **subtotal**.



Since the purchase orders will be faxed to the companies, only one copy of each is needed. You may type the orders on the typewriter, correcting all errors, or you may use the word processor to create your form. NOTE: If you use the word processor, be sure to save the blank form, as you will need more than one copy of the form. If you use the typewriter, you will need to obtain several copies from your teacher.

As the purchasing agent, you are authorized to sign the purchase order on the purchasing agent line. Your teacher must sign the purchase order on the supervisor line.

REMEMBER: ACCURACY COUNTS! BE SURE TO CHECK YOUR CALCULATIONS, YOUR FIGURES THAT YOU TYPE IN, AND YOUR ADDRESS THAT YOU TYPE IN! EVERYTHING MUST BE PERFECT!

COST COMPARISON WORKSHEET

DIRECTIONS: Using the chart below and the vendor information, list each vendor and the price per item for each item that they carry. If they do not have a price for that item, put a straight line through the column. Circle the best price for each item. Then prepare your purchase orders according to the instructions on the preceding page.

VENDOR NAME	TYPE-WRITERS	RIBBONS	COMPUT-ERS	CALCU-LATORS	PAPER	DISK-ETTES

VENDOR LIST

Carolina Computers
515 N. Eastern Street
Kinston, NC 28501

MacIntosh System--$3,250.00

Computers R Us
300 S. Saunders Street
Raleigh, NC 27603

MacIntosh System--$3,050.00

City Office Supply
400 N. Elm Street
Greenville, NC 27834

Electronic Typewriters--$425.00
Typewriter Ribbons--$4.35 each
Printer Paper--$10.50 per box
Diskettes--$8.75 per box
Calculators--$49.50

Babbages
1400 Lakeview Drive
Salisbury, NC 28145

Diskettes--$8.50 per box
Printer Paper--$11.25 per box
Typewriter Ribbons--$4.40 each

Typewriter XChange
515 S. Main Street
Salisbury, NC 28145

Electronic Typewriters--$415.00
Typewriter Ribbons--4.38 each
Calculators--$49.75
Diskettes--$8.65 per box
Printer Paper--$10.75 per box

NUMBER ONE SCHOOLS PURCHASE ORDER
P. O. Box 5000
Ourtown, NC 28554

Purchase Order No. _____ Date: _____

Vendor Name _____

Address _____

_____

QUANTITY	UNIT	DESCRIPTION	UNIT PRICE	TOTAL PRICE
		Subtotal		
		Shipping & Handling (10%)		
		Sales Tax (6%)		
		Total		

_____
(Purchasing Agent Signature)

_____
(Supervisor Signature)

E1003-A6 (Concluded)

NUMBER ONE SCHOOLS PURCHASE ORDER
P. O. Box 5000
Ourtown, NC 28554

Purchase Order No. 1 Date: Current Date

Vendor Name Computers R Us

Address 300 S. Saunders Street

Raleigh, NC 27603

QUANTITY	UNIT	DESCRIPTION	UNIT PRICE	TOTAL PRICE
5	Each	MacIntosh Computer Systems	$ 3,050.00	$15,250.00
		Subtotal		$15,250.00
		Shipping & Handling (10%)		1,525.00
		Sales Tax (6%)		915.00
		Total		$17,690.00

Student Signature
(Purchasing Agent Signature)

Teacher Signature
(Supervisor Signature)

E1003-TK1

NUMBER ONE SCHOOLS PURCHASE ORDER
P. O. Box 5000
Ourtown, NC 28554

Purchase Order No. 2 Date: Current Date

Vendor Name City Office Supply

Address 400 N. Elm Street

Greenville, NC 27834

QUANTITY	UNIT	DESCRIPTION	UNIT PRICE	TOTAL PRICE
25	Each	Typewriter Ribbons	$ 4.35	$ 108.75
10	Each	Calculators	49.50	495.00
3	Box	Computer Paper	10.50	31.50
		Subtotal		$ 635.25
		Shipping & Handling (10%)		63.53
		Sales Tax (6%)		38.12
		Total		$ 736.90

Student Signature
(Purchasing Agent Signature)

Teacher Signature
(Supervisor Signature)

NUMBER ONE SCHOOLS PURCHASE ORDER
P. O. Box 5000
Ourtown, NC 28554

Purchase Order No. 3 Date: Current Date

Vendor Name Babbages

Address 1400 Lakeview Drive

Salisbury, NC 28145

QUANTITY	UNIT	DESCRIPTION	UNIT PRICE	TOTAL PRICE
10	Box	Diskettes	$ 8.50	$ 85.00
		Subtotal		$ 85.00
		Shipping & Handling (10%)		8.50
		Sales Tax (6%)		5.10
		Total		$ 98.60

Student Signature
(Purchasing Agent Signature)

Teacher Signature
(Supervisor Signature)

E1003-TK1

NUMBER ONE SCHOOLS PURCHASE ORDER
P. O. Box 5000
Ourtown, NC 28554

Purchase Order No. 4 Date: Current Date

Vendor Name Typewriter XChange

Address 515 S. Main Street

Salisbury, NC 28145

QUANTITY	UNIT	DESCRIPTION	UNIT PRICE	TOTAL PRICE
25	Each	Electronic Typewriters	$ 415.00	$10,375.00
		Subtotal		$10,375.00
		Shipping & Handling (10%)		1,037.50
		Sales Tax (6%)		622.50
		Total		$12,035.00

Student Signature
(Purchasing Agent Signature)

Teacher Signature
(Supervisor Signature)

E1003-TK1

A DAY AT THE SUPERMARKET

The supermarket is a store that is used by almost everyone. The customers expect the visit to be pleasant and efficient from the time they walk in the door until they walk back out. They expect the shelves to be stocked with the items and brands that they want. They expect the store to be clean and spacious, free of debris, and full of attractive displays. They expect the checkout lines to be short and to move very quickly. They expect their groceries to be packaged correctly by the bagger. They expect any complaints to be properly handled by customer service representatives. Meeting these expectations takes the skill and dedication of a large group of workers. There is no room on the supermarket staff for workers who do not "know their stuff!"

Most supermarkets today have computerized scanners and weigh scales. This enables the cashier to simply pull the product across the scanner in order for the computer to record the bar code and look up the price in its database. The computer adds up the various prices, calculates sales tax, and gives a total price. The customer pays, the cashier enters the amount of money given, and the computer calculates the change back. All of this happens at the rate of 15 to 25 items per minute.

However, sometimes the computer system "goes down" for various reasons. The power may fail, the computer may experience a data overload, or there may be general equipment malfunction. In any case, the cashier sometimes has to calculate prices, tax, totals, and change by hand.

Activity #1: In your task for today, your store has experienced a power failure and you are being asked to keep the customer lines moving as quickly as possible. You will need to multiply the number of items times the price, add the total prices, calculate sales tax of 6%, and give the total. Given below are two shoppers' cart contents. Calculate the customers' totals. **Show your work!**

CUSTOMER #1

Qty.	Item	Price Each
1	pack of chicken	4.19
1	loaf of bread	.89
1	bag of oranges	1.49
1	six-pack of soda	2.89
2	dozen eggs	.91
3	pack of rice	1.19
3	cans of corn	.47
2	pounds of bacon	2.39
1	box of ice cream	2.89
2	boxes of macaroni	.53

CUSTOMER #2

Qty.	Item	Price Each
1	bag of corn meal	1.49
1	bag of potatoes	1.89
2	boxes of margarine	.99
1	bottle of catsup	1.39
4	pounds of bananas	.69
2	pks. of toilet tissue	1.29
2	lbs. of green beans	.49
1	box of Captain Crunch	3.49
2	packs of Oreos	2.39
2	deli pizzas	2.99

E1003-A7 (Continued on the next page)

Activity 2: The baggers must sort the groceries and load the bags in such a way that the groceries are transported easily. Using the seven guidelines for bagging groceries, go to your classroom "store" and bag the groceries on the shelf. Have your teacher observe you while doing this in order to evaluate your performance.

GUIDELINES FOR BAGGING GROCERIES

1. Observing the total number of items to be packaged, select the correct bag size.

2. Place frozen foods, wet produce, fresh meats, and other items that sweat in a separate bag. Before placing ice cream or sherbet in the bag, place it in an insulated bag first, especially in warm weather.

3. Form a base in the bottom of the bag, using heavy items, such as flour or sugar. Canned items should be place on or near the bottom. Avoid using sharp-edged packages at the corners of the base. Set items upright. Glass items should be placed near the center of the bag, not touching another glass item.

4. The middle of the bag should be filled with lighter items. Square the sides of the bag with flat-surfaced items.

5. Fill the top of the bag with easily damaged merchandise, such as eggs, cake, bread, soft cheese, or delicate produce.

6. Never mix chemical items, such as soaps, dishwashing detergents, ammonia, or items with strong odors (limburger cheese) with food items. Tighten caps of bleach or other types of chemical bottles.

7. Do not attempt to bag awkward items or easily-carried items. Examples of these are mops, brooms, detergents with carry handles, bags of potatoes or other produce, or cartons of beverages.

8. Fill the bags as full as possible in order to save costs and to preserve the environment. However, remember that the customer must get into his/her house with the bags without them tearing or spilling. Your end goal is a satisfied customer.

REMEMBER--YOUR GOAL IS TO HAVE A HAPPY CUSTOMER LEAVING YOUR STORE, NO MATTER WHAT YOUR JOB IS! A SATISFIED CUSTOMER IS THE BEST ADVERTISING YOU CAN HAVE! SERVICE, QUALITY, AND COURTESY MUST BE THE GOAL OF EVERY EMPLOYEE!

COURSE: Exploring Business & Marketing

UNIT: Marketing

COMPETENCY: 10.00 Evaluate personal interests and aptitudes in pursuing a career in marketing and simulate related activities.

OBJECTIVE: 10.04 Evaluate personal options in pursuing a career in marketing.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Use the handout entitled "Is This Career Right for You?" to evaluate personal options in pursuing a career in marketing.	Is This Career Right for You (Appendix)
2. Use the "Tree of Knowledge" handout to record the unit name and a related career in marketing.	Tree of Knowledge (Appendix)

Exploring Business and Marketing

Unit F:

Management

COURSE: Exploring Business & Marketing

UNIT: Management

COMPETENCY: 11.00 Explain the role of management in business.

OBJECTIVE: 11.01 Explain the levels and responsibilities of management.

TIME: 1 Class Period

ACTIVITY	RESOURCES
LEVELS OF MANAGEMENT	Levels of Management Information Sheet (F1101-A1)
1. Define and discuss the three levels of management.	
2. Contact a local company. Make a chart illustrating its organization. Discuss the information and compare to other companies.	
3. Ask students to research management positions from a local business. Report the findings to the class. Discuss differences and similarities.	
4. Ask a local businessperson to act as a guest speaker and discuss various aspects of business management today.	
RESPONSIBILITIES OF MANAGEMENT	
1. Explain and discuss the four functions of management.	Functions of Management Information Sheet (F1101-A2)
2. Define and discuss key terms related to management and supervision.	Management-Supervision Terms (F1101-A3) and Transparency (F1101-T1)
3. Discuss characteristics of a successful manager.	Characteristics of Successful Managers Information Sheet (F1101-A4)

LEVELS OF MANAGEMENT INFORMATION SHEET

Management can be broken down into three (3) basic levels:

* Top-level managers
* Middle-level managers
* Supervisors

Top-level managers must accept the greatest amount of responsibility for a business. They represent the company's thinking in regards to planning, organizing, and control of the company's resources. In order to meet their goals, top-level managers must allow lower-level managers to accept some of the responsibilities of the company as well. Top-level managers are concerned with the long-term goals of a company.

Middle-level managers are responsible for carrying out the decisions and directives of the top-level managers. They must often design and implement new programs and/or adjust existing programs of business.

Supervisors are the front-line management position. They work directly with the workers on the job. They assign job tasks and carry out the directives of the middle-level managers. Supervisors must often train personnel. The size of the group being supervised varies depending upon many circumstances. Therefore, the specific responsibilities of the supervisor are dictated by the number of employees for which the supervisor is responsible.

FUNCTIONS OF MANAGEMENT INFORMATION SHEET

The management of a business has been identified as being composed of four (4) basic components:

* Planning
* Organizing
* Directing
* Controlling

Planning involves setting the goals to be met. Without a plan, a company would not function properly. The plan includes short- and long-term goals. These goals include the steps necessary to accomplish the goals. Flexibility must be incorporated in the plans to allow changes in the plan as unforeseen situations occur.

Organizing involves the process of getting the necessary resources to accomplish the goals. After the manager has broken the goals down into various tasks, he/she can then determine what materials and resources will be needed. These items can then be purchased or ordered.

Directing involves various managers making sure that the responsibilities for which they are in charge are accomplished. This happens as a result of each manager guiding, leading, and influencing all individuals directly under them on the management ladder.

Controlling is the final function in the process, involving developing the level at which the work is expected to be done or deciding upon the quality standard for the work. A process is set up to evaluate the work, analyze the process, and make any necessary changes to ensure customer satisfaction.

F1101-A2

MANAGEMENT-SUPERVISION TERMS

Instructions: Define the following terms. Then discuss them as they relate to business.

1. management--

2. supervision--

3. diverse--

4. rationale--

5. strategies--

6. catalyst--

7. acquire--

8. credibility--

9. productivity--

10. demotivation--

11. rapport--

12. abruptly--

13. cynical--

14. vulnerable--

15. condescending--

CHARACTERISTICS OF SUCCESSFUL MANAGERS

- Leadership ability--is able to set goals and to motivate people to achieve those goals.
- Integrator--has the ability to bring groups with varying points of view together to get a task accomplished.
- Achievement-oriented--has a strong drive to achieve goals.
- Decision maker--makes decisions based on adequate information; makes the right decision almost all of the time on both routine and critical decisions.
- Rapport with higher management, peers, and staff--has trust of upper management and negotiates well with them; has open, cooperative relationship with other managers; has the ability to understand needs, problems, and anxieties of supervisors and staff and communicates that understanding well.
- Knowledgeable--knows the business thoroughly.
- Good planner--understands the principles of planning, budgeting, and scheduling a project and seeing that a plan is carried out.
- Good staffer--is able to identify and select "doers" rather than "talkers."
- Recognizes important projects--prioritizes projects and works with the staff on the most important projects rather than wasting time on low priority (or low payoff) activities.
- Loyalty--inspires people to do what is best for the company even when they are working in unsupervised situations.
- Helps others to grow--provides challenging job assignments that "stretch" the abilities of workers.
- Shares the glory--shares credit for successes with members of the staff but is willing to take responsibility for failures.
- Determination--goes "to bat" for good ideas and employees when they are right; knows when to "back off" so as not to become personally offensive; doesn't let circumstances, criticism, or other people's opinions deter the course of action or plan.
- Confidence--a powerful quality in getting things done and in obtaining the support of higher management and staff.
- Sense of humor--helps to promote group spirit and to relieve tension by maintaining a relaxed attitude when appropriate.

F1101-A4

MANAGEMENT-SUPERVISION TERMS DEFINED

1. management--the art of handling or directing with a degree of skill the affairs of a business firm or other organization.
2. supervision--a critical observing and directing (overseeing), such as watching and directing the activities of employees on a day-to-day basis in order to accomplish company objectives.
3. diverse--differing from one another; not alike.
4. rationale--the underlying reason for taking various actions.
5. strategies--carefully-made plans or methods.
6. catalyst--the means by which something takes place or is pulled together. (The supervisor or manager can serve as one who pulls things together.)
7. acquire--to obtain as one's own.
8. credibility--the ability to be believed or trusted.
9. productivity--effectively completing a measured amount of usable work within a specified time.
10. demotivation--affecting negative action in workers by failing to provide recognition for hard work or creative ideas.
11. rapport--a relationship marked by harmony and good will.
12. abruptly--occurring without warning.
13. cynical--being contemptuous; despising; disdaining; distrustful of human nature and motives.
14. vulnerable--open to attack, personal hurt, or damage.
15. condescending--having a patronizing attitude or an attitude of having to lower one's position or rank in order to deal with a person considered to be an inferior.

COURSE: Exploring Business & Marketing

UNIT: Management

COMPETENCY: 11.00 Explain the role of management in business.

OBJECTIVE: 11.02 Explain how managers use interpersonal communications skills.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Discuss how managers can effectively communicate with employees, business contacts, and the community in order to work more productively. 2. Use a role-playing situation in which one student takes the role of the manager and several others take the role of the workers. Have the workers pose situations to the manager and see how he/she reacts in trying to solve the situation. 3. Explain and give examples of one-way and two-way communications.	Tried and True Tips to be a Better Supervisor Information Sheet (F1102-A1)

TRIED AND TRUE TIPS TO BE A BETTER SUPERVISOR

☑ **Maintain a "You" Point of View.** Try to show the people you supervise how your ideas or procedures will meet their objectives, increase their influence, power, or status, or perhaps get them a promotion. Focusing on the "you" point of view will cause the worker you supervise to be more friendly and cooperative, and it will help you to get things done in your department or organization.

☑ **Help People to Feel Important and Worthwhile.** Studies show that recognition is a key factor in motivating people to work harder. Most people have a strong need to feel that they are important and to be recognized for their contributions to the company. Here are a few ways to make people feel important:

- Listen to them.
- Give deserved compliments.
- Acknowledge people who are waiting to see you.
- Pay attention to each person in a group.
- Use people's names.
- Show genuine interest in people's achievements.

☑ **Criticize constructively.** When there is a need to criticize an employee, try to do it in a positive, helpful way that will encourage the employee to respond in a constructive way. Here are some ways that work:

- Criticize in absolute privacy.
- When possible, give a compliment or a kind word before criticizing.
- Criticize the act, not the person.
- Show the employee how to correct the situation.
- Ask for the employee's cooperation in correcting the situation.
- End the criticism with a positive or friendly remark.

☑ **Listen carefully.** In order for a supervisor to have a good relationship with the people being supervised, he/she must acquire information about workers' needs, interests, problems, and experiences. Here are a few ways that this can be done:

- Listen for ideas and facts.
- Listen to gain a better understanding of the situation.
- Don't end a conversation abruptly because you heard something you didn't like.
- Try to see how much information you can gather from what people say.
- Be sensitive to personal situations that might be temporarily affecting a worker's performance.

☑ **Thank people.** Show others your appreciation with a sincere expression of your feelings.

☑ **Don't Tease People.** To make a job or get a laugh at the expense of someone else's feelings is not productive for anyone. Few people enjoy being the center of a joke. Take great care to avoid teasing other people, especially about things like:

* Weight	* Age	* Height	* Baldness
* Eyeglasses	* Speech	* Religion	* Clothes
* Mannerisms	* Race	* Lifestyle	* Relatives

☑ **Use an Open Performance Appraisal System.** Measure each employee's performance against a set of pre-established goals or against his/her own performance from the year before. This system implies that almost everyone can do well if he/she wants to.

☑ **Don't expect perfection.** If you set realistic expectations for your employees but encourage them to produce their very best, you will frequently be pleasantly surprised by the quality of work produced.

☑ **Answer Your Telephone Calls.** Failure to answer telephone calls promptly may mean that an employee can't go on with a job because he/she doesn't have necessary information, or it may mean that you won't get information that would be helpful to you.

☑ **Avoid Constant Nit-Picking.** Criticizing minor details that do not contribute to the effectiveness or quality of the task at hand is nit-picking. This not only damages the morale of employees but also wastes valuable time and diverts energy from meaningful business activities.

☑ **Avoid Hiring Friends or Relatives.** A number of problems can come about when a supervisor hires friends or relatives. Here are a few examples of these problems:

- Existing employees feel threatened.
- Employees feel that good job openings will go to friends and relatives even if they are not qualified.
- Employees feel that raises and promotions will be affected by the personal relationship that exists between the supervisor and the friend or relative.
- Employees feel that friends and relatives are permitted to do things that others are not allowed to do.
- Employees feel that if a cutback of staff is required, friends and relatives will be the last to go.
- Very awkward situations arise if it becomes necessary to fire a friend or a relative.

☑ **Prepare a Policy and Procedure Manual.** A manual on policy and procedure can be quite time- and cost-saving. A good manual should have the following:

- Information about policies and procedures in a clearly stated, uncomplicated manner.
- Periodic revisions to keep it updated and in line with current goals and objectives of the company.
- Approval of the top management.

COURSE: Exploring Business & Marketing

UNIT: Management

COMPETENCY: 11.00 Explain the role of management in business.

OBJECTIVE: 11.03 Explain the use of computers by managers.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Discuss and display business-related products generated by a computer through the use of a word processing program. Include in the discussion items such as saving and retrieving stored files, ease of revisions, spell checking, and text manipulations.	Word Processing Example Sheet (F1103-A1)
2. Discuss and display products generated by a computer through the use of a database program. Include in the discussion items such as development of records, categories, and fields. Also discuss the uses and values of databases within the business world.	Database Example Sheet (F1103-A2)
3. Discuss and display products generated by a computer through the use of a spreadsheet program. Include in the discussion items such as the development of a layout; working with cells, rows, and columns; and the use of formulas within the cells. Discuss how a spreadsheet can be used to prepare financial statements, depreciation and taxes, models and projections, expense records, bookkeeping records, and contract estimations.	Spreadsheet Example Sheet (F1103-A3)

WORD PROCESSING EXAMPLE SHEET

3478 Cardinal Avenue
Miami, FL 62701-6853
January 29, ----

Mr. Frank Darden
InfoComp, Inc.
330 Macon Drive
Chicago, IL 80719-9103

Dear Mr. Darden:

Instead of answering your questionnaire about the form I use to prepare personal-business letters, I thought I'd send you this sample letter.

There are just two standard letter formats that are widely used today: block, in which all lines start at the left margin; and modified block, in which all lines start at the left margin except the return address and date block and the closing line block. Personal-business letters, like business letters, can be acceptably typed in either of these two styles or formats.

Your questionnaire seems to be trying to create undistinguishable differences in letter format when what is actually involved are slight adaptations to fit only slightly different applications. Personal-business letters are not distinguishable from business letters by style or format. Instead, the format is determined by the originator based on the purpose, placement of the return address, and the number and kinds of parts included.

I hope you find this clarification helpful in giving you a better direction for your research.

Sincerely,

Susan S. Smithwick

DATABASE EXAMPLE SHEET

File: F1103A2 REVIEW/ADD/CHANGE Escape: Main Menu

Selection: All records

Record 1 of 12 (12 selected)

Inv. #: 00001
Item Description: Apple IIe
Pur. Date: Sep 10 83
Pur. Price: 1,850.00
Location: Room 101
User's Name: Scott Jarvis

File: F1103A2 REVIEW/ADD/CHANGE Escape: Main Menu

Selection: All records

Inv. #	Item Description	Pur. Date	Pur. Price	Location	User's Name
00001	Apple IIe	Sep 10 92	1,850.00	Room 101	Sarvis
00002	Laser Printer	Sep 10 92	275.00	Room 101	Sarvis
00003	IBM Computer	Jan 22 93	1,234.55	Room 114	McKnight
00004	Zerox Copier	Jun 22 91	965.32	Room 217	Lackey
00005	Desk	Feb 26 90	256.89	Room 102	LeVinge
00006	Chair	Feb 26 90	127.00	Room 102	LeVinge
00007	Bookshelf	Mar 1 91	217.00	Room 114	McKnight
00008	Wall Clock	Apr 20 92	37.00	Room 207	Ayers
00009	Coat Hanger	Jul 8 92	36.00	Room 210	Tucker
00010	Collator	Oct 22 92	137.00	Room 200	Eddleman
00011	Computer Desk	Sep 10 92	296.00	Room 101	Sarvis
00012	File Cabinet	Jul 6 93	222.00	Room 232	Dunagan

SPREADSHEET EXAMPLE SHEET

File: Pay . . . . . REVIEW/ADD/CHANGE Escape: Main Menu

```
========A========B========C========D=======E=======F=======G=====

  1  Name:  Mike Short
  2
  3  Rate       $6.00      $6.00     $6.00   $6.00    $6.00
  4  ============================================================
  5  Week #                  1         2       3        4
  6  ============================================================
  7  Hours                  30.00     40.00   41.00    50.00
  8  Regular Pay          $180.00   $240.00 $240.00  $240.00
  9  Overtime Pay           $0.00     $0.00   $9.00    $90.00
 10                      ----------------------------------------
 11  Net Pay              $180.00   $240.00 $249.00  $330.00
 12
 13  FICA        7.05%     $12.69    $16.92  $17.55   $23.26
 14  Withholding           $18.00    $26.40  $27.39   $42.90
 15
 16  Take-home Pay        $149.31   $196.68 $204.06  $263.83
 17
 18
-------------------------------------------------------------------

C14:  (Value, Layout-D2)  @LOOKUP(52*C11,H2...H18)*C11
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F1103-A3

COURSE: Exploring Business & Marketing

UNIT: Management

COMPETENCY: 12.00 Evaluate personal interest and aptitudes in pursuing a career in management and simulate related activities.

OBJECTIVE: 12.01 Investigate current career opportunities in management.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Select and research a career in management using the Occupational Outlook Handbook.	Occupational Outlook Handbook
2. Conduct a field trip to a local business for a guided tour and presentation of jobs offered by that company and the industry as a whole. The personnel department of the company can be very helpful.	
3. Contact a local businessperson involved in management and invite him/her to come to your class as a guest speaker. Videotape the presentation for future use.	
4. View previously-videotaped presentations of guest speakers which represent management from local businesses.	
5. View a selected film or video dealing with management and/or business.	Modern Talking Picture Services 5000 Park Street North St. Petersburg, FL 33709 1-800-243-6877

COURSE: Exploring Business & Marketing

UNIT: Management

COMPETENCY: 12.00 Evaluate personal interests and aptitudes in pursuing a career in management and simulate related activities.

OBJECTIVE: 12.02 Assess the education, experience, and other requirements for different levels of management.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Use the handout, "Tree of Knowledge," to assess the education, experience, and other requirements for management occupations.	Tree of Knowledge (See Appendix)
2. Assign interviews or research tasks to several students. The students should contact local businesses and talk with the personnel directors. Determine all requirements for the three levels of management within that organization. Report the findings to the class.	
3. Ask the personnel director of a local business to act as a guest speaker for your class. Present a program about his/her company and discuss requirements for management. Finish with a question-and-answer session. (Consider video taping the presentation for use with future classes.)	

COURSE: Exploring Business & Marketing

UNIT: Management

COMPETENCY: 12.00 Evaluate personal interests and aptitudes in pursuing a career in management and simulate related activities.

OBJECTIVE: 12.03 Examine situations that are encountered by managers.

TIME: 2 Class Period

ACTIVITY	RESOURCES
1. Utilize the talents of a local businessperson as a guest speaker. Ask the speaker to address problems and situations that are encountered during an average day. (Video the presentation for future use.)	
2. Use role playing to depict various situations that managers face. Some scenes may include: * an interview * training someone to perform a job-related task * hiring someone * firing someone * telling an employee that work is not up to standards * dealing with an employee who wants a raise * dealing with an irate client * dealing with an employee who has been caught stealing or using drugs.	
3. Select a suitable video, movie, or filmstrip related to managerial responsibilities and related topics.	Modern Talking Picture Service, 5000 Park Street North, St. Petersburg, FL 33709-9989 1-800-243-6877

COURSE:	**Exploring Business & Marketing**	
UNIT:	**Management**	
COMPETENCY:	**12.00**	**Evaluate personal interests and aptitudes in pursuing a career in management and simulate related activities.**
OBJECTIVE:	**12.04**	**Simulate managerial activities using computer software applications.**
TIME:	**4 Class Periods (Cont'd. on next page)**	

ACTIVITY	RESOURCES
1. The students should use the computer and a word processing program to type the "Block Style Letter Example Sheet," checking for spelling and typographical errors. After printing, have the students convert the letter to a modified block style with indented paragraphs, using the example sheet as a guide. Discuss the advantages of word processors over typewriters for tasks such as this. Discuss also the necessity for management to have keyboarding and word processing skills.	Block Style Letter Example Sheet (F1204-A1) Modified Block with Indented Paragraphs Example Sheet (F1204-A2)
2. The students should use the computer and a database program to create an electronic card catalog. Set up six categories: First Name, Last Name, Company Name, Mailing Address, City/State/Zip Code, and Phone Number. Enter the data and perform two sorts by Last Name and by Company.	Database Information Sheet (F1204-A3)
3. The students should use the computer and a spreadsheet program to prepare a spreadsheet for Barney's Blueberry Bagels. Use the "Spreadsheet Example Sheet" to develop the	Spreadsheet Activity Sheet (F1204-A4) Spreadsheet Example Sheet (F1204-A5)

F1204--Continued on Next Page

COURSE:	**Exploring Business & Marketing**	
UNIT:	**Management**	
COMPETENCY:	**12.00**	**Evaluate personal interests and aptitudes in pursuing a career in management and simulate related activities.**
OBJECTIVE:	**12.04**	**Simulate managerial activities using computer software applications.**
TIME:	**4 Class Periods (Cont'd. from previous page)**	

ACTIVITY	RESOURCES
design, complete, and check the spreadsheet. 4. Have the students complete the following projects using the computer. Writing skills, computer knowledge, and proofreading skills already acquired should be utilized in the completion of these projects. * Write a resume and print the finished product. * Use the database created in Activity 2 to print computer-addressed envelopes or labels. * Taking the position of a manager who is requesting a lending institution to approve a loan to expand the business, have the students compose a letter at the word processor. * Using the word processor, create an agenda for a meeting. Include topics and subtopics. * Compose a motivational memo to employees. * Compose a letter recruiting a talented prospect for a position in your business firm.	

F1204 (Concluded)

Block Style Letter Example Sheet

3589 North Pelican Drive
Boston, MA 56889
November 12, 19--

Bob Pawlowski, Vice President
Front Runner, Inc.
549 South Alabama Drive
Charlotte, NC 28443

Dear Bob:

Enclosed are listings of the various holidays, holy days, and other commemorative dates as they will occur for the next three years. Kindly file them under Tab 201 of your manual, replacing the same pages for prior years. These lists will be helpful to you in planning work schedules and lists of paid holidays for the years ahead.

We have marked the legal holidays with asterisks. For a review of the various legal requirements, please refer to the white paper under Tab 201 dated November, 1991.

I hope these lists will be helpful to you. Please be sure to call me if you have questions or require additional clarifications.

Cordially,

Osvaldo Novo
Compliance Consultant

ws (Use your initials)

Enclosures (2)

Modified Block with Indented Paragraphs Example Sheet

3589 North Pelican Drive
Boston, MA 56889
November 12, 19--

Bob Pawlowski, Vice President
Front Runner, Inc.
549 South Alabama Drive
Charlotte, NC 28443

Dear Bob:

Enclosed are listings of the various holidays, holy days, and other commemorative dates as they will occur for the next three years. Kindly file them under Tab 201 of your manual, replacing the same pages for prior years. These lists will be helpful to you in planning work schedules and lists of paid holidays for the years ahead.

We have marked the legal holidays with asterisks. For a review of the various legal requirements, please refer to the white paper under Tab 201 dated November, 1991.

I hope these lists will be helpful to you. Please be sure to call me if you have questions or require additional clarifications.

Cordially,

Osvaldo Novo
Compliance Consultant

ws (Use your initials)

Enclosures (2)

Database Information Sheet

Rod Harrelson
Aires Quick Copy
1465 S. Eighth Street
Charlotte, NC 28366
1-800-548-9953

David Rothwell
Ranier Office Supply
5327 148th Street
Charlotte, NC 28366
1-800-556-4582

John Bullard
Best and Marsh's
10476 NE Eighth Avenue
Charlotte, NC 28366
1-800-548-5298

David Jordan
Fly High Printing Company
456 East Par Avenue
Charlotte, NC 28366
1-800-448-3321

Dan Tedder
Bo's Print Mart
7264 Northrup Way South
Charlotte, NC 28366
1-800-332-5545

John Barnard
University Print Shop
10056 Roosevelt Avenue
Charlotte, NC 28366
1-800-336-5512

Harvey Pons
Evergreen Printing Supply
4769 NE 20th Street
Charlotte, NC 28366
1-800-632-2089

Phil Blanton
The Print Pot
801 NW Adamson
Charlotte, NC 28366
1-800-442-3648

Terry Bell
Jensen Office Supply
800 E. Eighth Street
Charlotte, NC 28366
1-800-555-2231

Steve Binder
Foster's Printing Presses
83657 East Broad Street
Charlotte, NC 28366
1-800-332-4568

Spreadsheet Activity Sheet

The empty spreadsheet below is used by Barney, of Barney's Blueberry Bagels, to track profits and losses for an entire year. The spreadsheet can also be used to forecast rise and falls in business. By studying a spreadsheet, Barney can try to figure why some months are better than others for the bagel business.

Design a spreadsheet like Barney's. The Total Expenses column and the Total Income column should both be summed at the bottom of each column to determine yearly totals. The Profit/Loss Column is derived by subtracting the expenses from the income for each month. This column should also be totalled at the bottom. This is THE BOTTOM LINE, so to speak.

Once you have designed the spreadsheet, take the information below and fill in Barney's spreadsheet. Did he make a yearly profit? In which months did he lose money? Why do you think this happened? What are your recommendations for his future business?

BARNEY'S BAGELS INCOME/EXPENSE FIGURES
FOR THE CURRENT YEAR

MONTH	TOTAL EXPENSES	TOTAL INCOME	PROFIT/LOSS
JAN	235.00	373.00	?
FEB	345.00	435.00	?
MAR	398.00	354.00	?
APR	427.00	386.00	?
MAY	385.00	589.00	?
JUN	1983.00	768.00	?
JUL	519.00	821.00	?
AUG	697.00	867.00	?
SEP	583.00	968.00	?
OCT	834.00	1025.00	?
NOV	725.00	835.00	?
DEC	1445.00	1275.00	?
TOTALS->	?	?	?

NOTE: Be sure that your totals are the same as the ones given below. If your totals are not the same, check your figures to make sure you keyed them in correctly!

Total Expenses: $8,576.00 Total Income: $8,696.00

Net Profit: $120.00

COURSE:	**Exploring Business & Marketing**	
UNIT:	**Management**	
COMPETENCY:	**12.00**	**Evaluate personal interests and aptitudes in pursuing a career in management and simulate related activities.**
OBJECTIVE:	**12.05**	**Evaluate personal options in pursuing a career in management.**
TIME:	**1 Class Period**	

ACTIVITY	RESOURCES
1. Use the handout entitled "Is This Career Right For You?" for students to evaluate personal options in pursuing a career in management.	Is This Career Right For You? (Appendix)
2. Use the "Tree of Knowledge" handout to record the unit name and a related career.	Tree of Knowledge (Appendix)
3. Ask your guidance counselor to speak to your class about the course options available in high school to prepare them for a career in management.	
4. Use a role-playing situation based on the game "What's My Line." Select one student to be the guest and four students to sit on the panel. Each panel member may ask four yes or no questions to try to guess the career of the guest. Change the guest and panel after the career has been uncovered.	

Exploring Business and Marketing

Unit G:

Small Business/Entrepreneurship

COURSE:	**Exploring Business & Marketing**	
UNIT:	**Small Business/Entrepreneurship**	
COMPETENCY:	**13.00**	**Explain the role of small business in the economy and the role of entrepreneurs in small business.**
OBJECTIVE:	**13.01**	**Explain the value of small business to the free enterprise system.**
TIME:	**1 Class Period**	

ACTIVITY	RESOURCES
1. Introduce the vocabulary for the small business/entrepreneurship unit by distributing the vocabulary sheet.	Vocabulary Words for the Small Business/Entrepreneurship Unit (G1301-A1)
2. Explain the definition of a small business and the value of small business to the free enterprise system by using the Small Business Guide. (May be duplicated for the class, used as a teacher guide, or used as an overhead transparency.)	Small Business Guide (G1301-A2)
3. Explain the types of business ownerships using the Types of Business Ownership Guide. As a class, complete the chart, "Types of Businesses."	Types of Business Ownership Guide (G1301-A3) Types of Businesses Chart (G1301-A4)
4. Explain the different types of small businesses using the "Types of Businesses" handout. Complete the chart, "Small Businesses in Your Community," listing them by category.	Types of Businesses Guide (G1301-A5) Chart: Small Businesses in Your Community (G1301-A5)
5. Review terms and concepts by using the Small Business fill-in-the-blank activity.	Small Business Fill-In (G1301-A6 & G1301-TK1)
6. During the unit, have students participate in a "Market Day" or Barter Day."	Teacher Instructions for Market Day (G1301-TIS1)

VOCABULARY WORDS FOR SMALL BUSINESS/ENTREPRENEURSHIP

1. bankruptcy--the business does not have enough money to pay its creditors after selling the business.

2. corporation--a business owned by several people who buy shares of the business.

3. creditor--a person or company to whom money is owed.

4. entrepreneur--a person who is a risk-taker who starts a business to make a profit.

5. entrepreneurship--starting, managing, and owning one's own business. Entrepreneurship brings the possibility of profit or the risk of loss.

6. failure--the closing of a business while it still owes money to creditors.

7. financial plan--a plan that shows start-up costs, projected income, operating costs, and expenses.

8. franchise--the right to sell a company's goods or services in a particular geographic area.

9. partnership--ownership of a business by two or more people.

10. profit--money left over after expenses have been paid.

11. retail business--a business that sells goods or products to consumers.

12. service business--provides tasks or functions to consumers.

13. small business--employs fewer than 500 people, has the owner as the manager, and is usually locally owned.

14. Small Business Administration (SBA)--a government-funded organization designed to help small businesses with loans and management ideas.

15. sole proprietorship--a business owned by one person.

16. working capital--money needed to start a business.

SMALL BUSINESS GUIDE

THE VALUE OF SMALL BUSINESS TO THE FREE ENTERPRISE SYSTEM

In the American free enterprise system, small business plays the role of providing products or services for consumers. A small business hires less than 500 employees and most have less than four employees. Small businesses are usually locally owned with the owner serving as the manager. They are formed to make a profit and to supply goods and/or services that people want or need.

The inventions and innovations of the small business owner help to promote economic growth. When these businesses are successful, the economy improves because more jobs are created and consumers have more choices as to where to spend the money they have earned. Small businesses help to promote competition, which makes for better products or services at lower prices. As more small businesses are started, it helps to ensure that no one company or person will have a monopoly on the market. The creation of new goods, products, or services helps technology to advance forward in improving our economy.

Small business ventures provide the basis for competition, new product lines, locally-owned businesses, community growth, and worker flexibility, which are all a part of free enterprise. By helping small businesses to succeed, the entire economy profits.

G1301-A2 (Continued on next page)

THE VALUE OF SMALL BUSINESS TO THE FREE ENTERPRISE SYSTEM:

TEN POINTS TO REMEMBER

1. The taxes businesses pay helps the government to provide services, such as better schools and roads, to the community.

2. New products or services are created when small business are started.

3. Small businesses provide goods or services locally that are needed and wanted by consumers.

4. A wider selection of stores from which to shop decreases the likelihood of a monopoly.

5. The free enterprise system ensures that individuals can make choices of whether or not to start a small business.

6. Small businesses create more jobs, thus helping the economy.

7. If a small business is successful, it promotes economic growth. If the small business fails, the loss is absorbed primarily by the owner.

8. Small business encourages competition, which makes for a higher quality product at a lower price.

9. The inventions and innovations created by the small business owner will improve economic growth and may have a far-reaching impact on society. (Alexander Graham Bell, the telephone; the McDonald brothers, fast-food restaurants; Herman Hollerith, IBM Corporation)

10. The small business concept allows individuals who wish to take the risk of owning their own business the freedom to work in a job that is comfortable for them without the restrictions of working under the chain of command of a large company.

TYPES OF BUSINESS OWNERSHIP GUIDE

SOLE PROPRIETORSHIP

A sole proprietorship is a business owned by one person. The owner is in full control of the business. Therefore, the owner stands to reap all the profits. (In like manner, if the company loses money, the owner must absorb the losses.) It is easy to start a business with the right amount of capital resources. It may be difficult to raise money to start the sole proprietorship business, since there is only one owner. The owner of a sole proprietorship will probably work long hours with little or no vacation time.

PARTNERSHIP

A partnership is a business owned by two or more people who combine their resources to start a business. Since there is more than one person involved, there are additional sources of experience and capital. Profits (or losses) from the business will be shared. Because there is a partner, it may be easier to take vacation time from work.

CORPORATION

A corporation is a business owned by several people who buy shares of the business. A corporation is legally a separate "person," independent of the owners. Major decisions are made by a board of directors. To raise capital, the company sells stock (shares) in the business. There is more paperwork involved in starting a corporation, and more government taxes have to be paid. If the corporation is not successful, the owners only lose the value of their shares of stock, not their personal property or savings. Note: As many small businesses grow, the owners may choose to incorporate in order to increase working capital and decrease individual risk.

FRANCHISE

A franchise involves the purchasing of the right to sell another company's food or services in a particular geographic area using the parent company's name, logo, and packaging. Examples of franchises are McDonald's, Domino's, Western Steer, A Cleaner World, Chevrolet, etc.

TYPES OF BUSINESSES CHART

TYPE OF BUSINESS	DEFINITION	EXAMPLE	ADVANTAGES
SOLE PROPRIETORSHIP			
PARTNERSHIP			
CORPORATION			
FRANCHISE			

TYPES OF BUSINESSES GUIDE

Service: performs a task or a function for the consumer (lawn maintenance, cleaning, car detailing, hair salon, automobile repairs, music teacher, television stations, accounting firms, real estate agencies, theaters, etc.)

Retail: sells products (goods) to consumers (woodworking shops, craft items, T-shirts, grocery stores, ice cream trucks, sporting goods stores, jewelry fashions, floral shops, etc.)

Franchise: receives permission to operate a business selling products or services that are owned and controlled by another company (McDonald's, Wendy's, Holiday Inn, Chevrolet, Kinko's Copies, etc.)

Others: construction, manufacturing, wholesalers, agriculture, etc.

SMALL BUSINESSES IN YOUR COMMUNITY

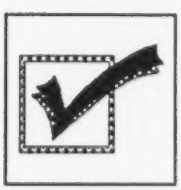
RETAIL BUSINESSES	SERVICE BUSINESSES	FRANCHISES

SMALL BUSINESS FILL-IN

Listed below are some reasons why small businesses help to make the American economy prosperous and help to promote free enterprise. Fill in the blanks with the appropriate answers. Check off each word as you use it.

1. W _ _ _ _ selection of goods and products
2. N _ _ products and services
3. Promotes c _ _ p _ _ _ _ _ _ n
4. Advances t _ _ _ n _ _ _ _ _
5. B _ _ _ _ _ products and l _ _ e _ prices
6. Limits a m _ _ _ p _ _ _ in the market on a good or a service
7. I _ _ _ v _ _ _ _ _ s are made
8. Creates more j _ b _

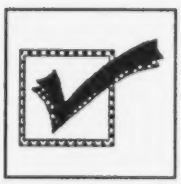
jobs	**technology**
monopoly	**wider**
better	**lower**
innovations	**new**
competition	



SMALL BUSINESS FILL-IN

Listed below are some reasons why small businesses help to make the American economy prosperous and help to promote free enterprise. Fill in the blanks with the appropriate answers. Check off each word as you use it.

1. Wider selection of goods and products
2. New products and services
3. Promotes competition
4. Advances technology
5. Better products and lower prices
6. Limits a monopoly in the market on a good or a service
7. Innovations are made
8. Creates more jobs



jobs	**technology**
monopoly	**wider**
better	**lower**
innovations	**new**
competition	

t

COURSE: Exploring Business & Marketing

UNIT: Small Business/Entrepreneurship

COMPETENCY: 13.00 Explain the roles of small businesses in the economy and the role of entrepreneurs in small business.

OBJECTIVE: 13.02 Explain the role of entrepreneurs in small businesses.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Discuss the role of the entrepreneur in small business. Have students complete the crossword puzzle, using the definitions that have been incorporated into the discussion.	Small Business Guide (G1302-A1) Crossword Puzzle (G1302-A2 & G1302-TK1)
2. Discuss the growth of small businesses into large corporations, giving examples of successful small business people in history.	A Small Business May Lead to a Larger Business (G1302-A3)
3. Have students research and write a short paper on a famous entrepreneur.	
4. Invite an entrepreneur to visit the class or have students interview a small business owner in the community.	Interview a Small Business Owner (G1302-A4)

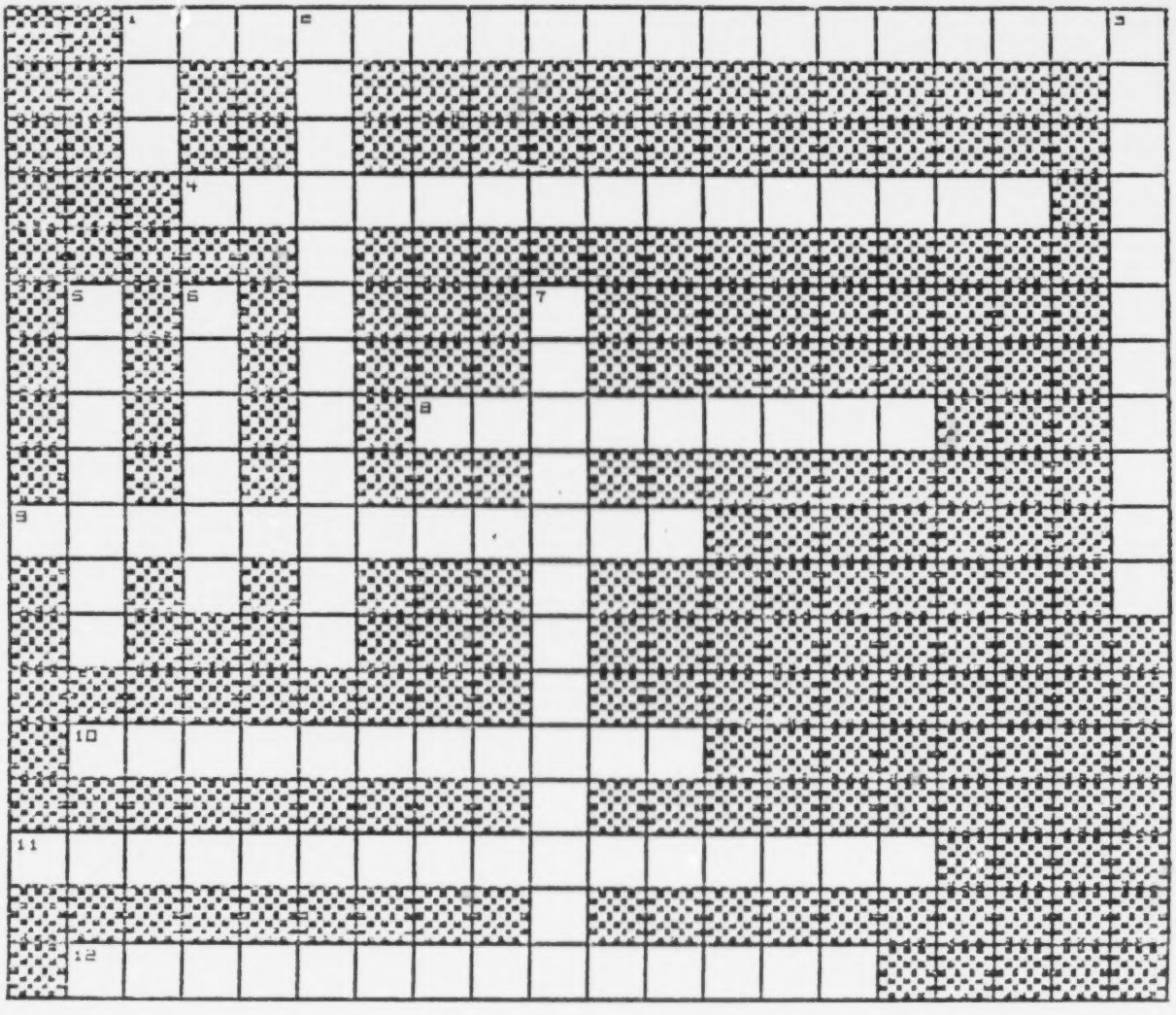
THE ROLE OF ENTREPRENEURS IN SMALL BUSINESS:

An entrepreneur is a person who recognizes a need for a product or service and takes a risk in starting a business to make a profit. Entrepreneurship is the result of starting, managing, and running your own business. The entrepreneur's creativity provides the major source of new ideas or innovations. Small businesses are owned and operated by an entrepreneur. The entrepreneur must know why the good or service that will be used in the business is something that consumers want or need and must develop and implement a business plan for financial success.

ROLE OF ENTREPRENEURS:

1. To become wealthy through running a successful business.
2. To have the freedom to make his/her own decisions.
3. To provide a good or service to satisfy the needs or wants of the consumer.
4. To be in charge of the business, thereby being his/her own boss.
5. To help promote the economy by creating new products or services.
6. To provide more competition in the economy.
7. To receive satisfaction by providing a good or service that may help someone else, including the handicapped, disadvantaged, or elderly.
8. To recognize the opportunity to use capital resources and human resources in an innovative way.
9. To become influential in the community as a result of operating a successful business.

SMALL BUSINESS XWORD



ACROSS CLUES

1. A business owned by one person
4. A business that performs tasks for individuals
8. The right to sell a business's goods or services in a certain geographical area
9. The first step in planning a successful business
10. A business owned by several people who buy shares of stock in the business
11. The process of starting, managing, and owning your own business
12. A business that sells goods or products.

DOWN CLUES

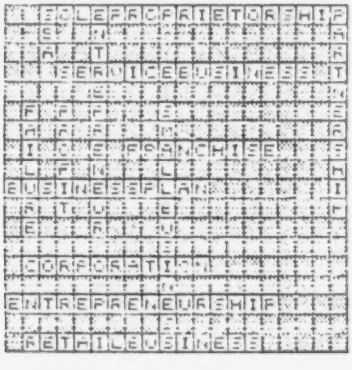
1. A government organization that provides loans and advice to small businesses
2. An individual who is a risk taker, starting a business to make a profit
3. A business owned by two or more people
5. A business that has closed and still owes money to a creditor
6. The money that is remaining after all bills have been paid.
7. A business in which the owner is usually the manager and fewer than 500 people are employed

G1302-A2

WORD LIST: SMALL BUSINESS XWORD

BUSINESSPLAN
CORPORATION
ENTREPRENEURSHIP
ENTREPRENEUR
FAILURE
FRANCHISE
PARTNERSHIP
PROFIT
RETAILBUSINESS
SBA
SERVICEBUSINESS
SMALLBUSINESS
SOLEPROPRIETORSHIP

ANSWERS: SMALL BUSINESS XWORD



G1302-TK1

BEST COPY AVAILABLE

A SMALL BUSINESS MAY LEAD TO A LARGER BUSINESS

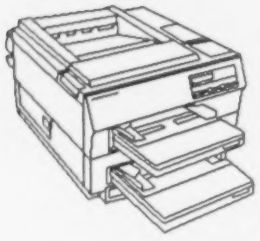
Most of our large business of today once began as a small business by an entrepreneur who used resources to create a new product or service. Once a market was created for the product or service and the product or service caused economic growth, then the small business grew into a large business or was bought by a larger business. Examples of this are Mary Kay Cosmetics, Sears, Montgomery Ward, Chrysler, Ford, McDonald's, Pepsi Cola, Blue Bell, J. C. Penny's, and Burlington Industries.

Most of our important innovations were created by an entrepreneur (self-employed owner). At first, these innovations were not considered significant until their economic value was determined to be important. Then the innovations became very successful and furthered economic growth. Examples of these innovations are telephones, computers, chain stores, automobiles, and vending machines.

EXAMPLES OF FAMOUS SUCCESSFUL ENTREPRENEURS:

Henry Ford	assembly line techniques
Walt Disney	Mickey Mouse & Company
Ray Kroc	McDonald's
Liz Claiborne	women's clothing
Debbie Fields	Mrs. Field's Cookie
Thomas Cook	first travel agency
Mary Kay Ashe	Mary Kay cosmetics
Bette Graham	Liquid Paper Corporation
Clarence Birdseye	quick-frozen vegetables
William Marriott	Marriott Hotels
Stephen P. Jobs	Apple Computer Company
Berry Gordy, Jr.	Motown Records
W. T. Harris	Harris Teeter Supermarkets
Frank Woolworth	Woolworth Stores

Can you add to this list?



INTERVIEW A

SMALL BUSINESS

OWNER!

1. What is the name of your business?

2. What product do you sell or what service do you provide?

3. Why did you start your business?

4. Why did you think people would want to buy your product or use your service?

5. Did you develop a business plan before starting your business?

6. What are some advantages of owning your own business?

7. What are some disadvantages of owning your own business?

8. What advice would you give someone who is interested in becoming an entrepreneur?

G1302-A4

COURSE: Exploring Business & Marketing

UNIT: Small Business/Entrepreneurship

COMPETENCY: 13.00 Explain the roles of small businesses in the economy and the role of entrepreneurs in business.

OBJECTIVE: 13.03 Explain the steps involved in starting a small business.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Explain the steps in starting a small business. 2. Explain the purpose of a business plan and list the parts of a business plan. (NOTE: There is a business plan in Section G1403.)	Steps in Starting a Business (G1303-A1) Developing a Business Plan (G1303-A2) A Successful Entrepreneur Must Do These Things! (1303-A3)

STEPS IN STARTING A BUSINESS

The basic components of starting a business are as follows:

1. Know the reasons why you want to start a business and know why there is a need for the product or service. You should have some detailed knowledge of the product or service.

2. Know where you are going to get the money to start your business. A business should not cost too much to start unless you have a lot of capital resources.

3. Know where you are going to locate the business. The location of your business is often very important. Zoning laws often restrict the location of a business, especially in a residential district. Commercial districts are usually more suitable.

4. Know how much time you have to put into the business. Be able to work the long hours required of a small business owner. Be prepared to take the risks involved in starting your business. You must have initiative and dedication.

DEVELOPING A BUSINESS PLAN

A ***business plan*** is important, because it provides a clear idea or picture of what you business is and how it can operate successfully. The success in starting a business begins with developing and implementing a business plan.

A business plan includes:

- *a description of the product or service*
- *why the product or service is different or better than what is on the market*
- *where the business will be located, including the cost of the site*
- *a potential customer list*
- *a financial plan*
- *a management plan*
- *an advertising plan*
- *a hiring plan*
- *a cost plan to include what price to charge in order to make a profit*
- *a future growth plan.*

G1303-A2

G1303-A2

A SUCCESSFUL ENTREPRENEUR MUST DO THESE THINGS!

1. Know why you are going into business for yourself.

2. Decide what product or service for which there is a need in your area.

3. Do a market survey to make sure you have come up with an idea that will be well received by the public.

4. Take a good look at your competition to see how their business is doing and what their pricing, advertising, and service policies are.

5. Examine the human resources in your community to determine the type of employees that will be available and to establish your hiring practices.

6. Determine where you are going to locate the business, what type of structure you will need, and what type of equipment you will have to install in the building. Then develop a financial plan that includes (a) the cost of setting up business and surviving for the first few months until you begin to turn a profit and (b) sources of funding for the establishment of your business.

7. Decide who your customers will be. It is necessary to target a group of clients and study their buying habits. No business can be all things to all people. Therefore, the successful small entrepreneur must know who he/she intends to try to draw into the business as customers.

MAKE LONG-RANGE GOALS FOR YOUR BUSINESS!

GET HELP WITH DEVELOPING A GOOD BUSINESS PLAN!

REMEMBER--IF YOU FAIL TO PLAN, YOU PLAN TO FAIL!

G1303-A3

COURSE: Exploring Business & Marketing

UNIT: Small Business/Entrepreneurship

COMPETENCY: 13.00 Explain the roles of small businesses in the economy and the role of entrepreneurs in business.

OBJECTIVE: 13.04 Identify reasons for small business failure.

TIME: 1 Class Period

ACTIVITY	RESOURCES
1. Explain what a small business failure means and what bankruptcy means.	Reasons for Small Business Failure (G1304-T1)
2. Ask students to list possible reasons that may cause a small business to fail.	
3. Use the two case studies in a class discussion.	Case Study Handout (G1304-A1 & G1304-TK1)
4. Ask students to write a case study concerning a small business failure. Share some of these and have the class come up with reasons for failure and situations that could have avoided that failure.	
5. Have students complete the word search puzzle on small business failures.	Small Business Failures Puzzle (G1304-A2 & G1304-TK2)

REASONS FOR SMALL BUSINESS FAILURE

1. POOR PLANNING
2. LACK OF EXPERIENCE
3. LACK OF KNOWLEDGE IN SALES OR MANAGEMENT
4. WRONG LOCATION
5. NOT KEEPING GOOD RECORDS
6. POOR ADVERTISEMENT
7. POOR ECONOMIC CONDITIONS, AS A RECESSION
8. OVERSTAFFING
9. TOO MANY EXPENSES

G1304-T1

CASE ONE

John Sullivan opened a store that specializes in clothing and equipment for the jogger. He chose a location in a small strip shopping center out of town. The shop had a small amount of traffic going by and was hard to see from the main road. He had a small number of customers coming into the shop and only a third of these made a purchase. Repeat customers were not coming in. John eventually had to close the shop because of lack of funds.

QUESTION

What are some reasons for his business failure?

CASE TWO

Mr. and Mrs. Alvin Smith decided to open a video rental shop. They chose a strip shopping center which was located in the center of a heavily populated area and that would be the closest rental shop. They opened the shop and it proved to be very successful. Then they were able to hire enough employees to have three in the shop at all times. Meeting this excessive salary expense became difficult. They did not want to release anyone. They began to have financial problems.

QUESTION

What do Mr. and Mrs. Smith need to do before they have a business failure?

CASE ONE

John Sullivan opened a store that specializes in clothing and equipment for the jogger. He chose a location in a small strip shopping center out-of-town. The shop had a small amount of traffic going by and was hard to see from the main road. He had a small number of customers coming into the shop and only a third of these made a purchase. Repeat customers were not coming in. John eventually had to close the shop because of lack of funds.

QUESTION

What are some reasons for his business failure? 1. poor-location because of being out-of-town, off the main road, and hard to see; 2. lack of customers--low number, no repeat customers; 3. lack of funds because of no profit; 4. limited inventory--did not allow for a variety of customers with different athletic needs

CASE TWO

Mr. and Mrs. Alvin Smith decided to open a video rental shop. They chose a strip shopping center which was located in the center of a heavily populated area, and that would be the closest rental shop. They opened the shop and it proved to be very successful. Then they were able to hire enough employees to have three in the shop at all times. Meeting this excessive salary expense became difficult. They did not want to release anyone. They began to have financial problems.

QUESTION

What do Mr. and Mrs. Smith need to do before they have a business failure? Stop overspending by lowering the number of employees or readjust funds to be lower in another area of expense.

SMALL BUSINESS FAILURES

X P G W I E B S O A H O F X M H F F G F
T O O M A N Y E X P E N S E S K V D C I
S O Z A V L A C K O F C U S T O M E R S
E R P L M L A C K O F K N O W L E D G E
E M L A C K O F P R O F I T S L Z M C O
T A N G O Z H T O A T B D M D X O G M V
R N L Z M C R G O D E E T G Q T C Q G L
N A L Z P H P H R V K Y G I I G Z K D N
M G B A E W O V F E L L S Q S W C Z M Y
B E W U T F O C I R W V H R L O A O U Z
E M F J I Y R B N T F N L E F I J K B Q
V E M A T M R S A I D V K X O Q M D I W
Q N Q B I G E X N S P Y G L W Y I W C I
F T O G O B C Q C I E S L P Q S U U K F
A N Q C N Y O Q I N W P H Y E D T L J F
S F Y F K W R O N G L O C A T I O N S W
Q R Y J N P D M G N H E X C V N S V I N
M M B J U B S V A I G W N M O X B D J B

Can you find these words?

POORADVERTISING
LACKOFKNOWLEDGE
POORFINANCING
POORRECORDS
LACKOFCUSTOMERS
POORMANAGEMENT
WRONGLOCATION
TOOMANYEXPENSES
LACKOFPROFITS
COMPETITION

Answer Key for: SMALL BUSINESS FAILURES

```
. P . . . . . .
T O O M A N Y E X P E N S E S . . . . .
. O . . . L A C K O F C U S T O M E R S
. R . . . L A C K O F K N O W L E D G E
. M L A C K O F P R O F I T S . . . . .
. A . . O . . . O A . . . . . .
. N . . M . . . O D . . . . . .
. A . . P . P . R V . . . . . .
. G . . E . O . F E . . . . . .
. E . . T . O . I R . . . . . .
. M . . I . R . N T . . . . . .
. E . . T . R . A I . . . . . .
. N . . I . E . N S . . . . . .
. T . . O . C . C I . . . . . .
. . . . N . O . I N . . . . . .
. . . . . W R O N G L O C A T I O N . .
. . . . . D . G . . . . . .
. . . . . S . . . . . .
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BEST COPY AVAILABLE

COURSE: Exploring Business & Marketing

UNIT: Small Business/Entrepreneurship

COMPETENCY: 13.00 Explain the roles of small businesses in the economy and the role of entrepreneurs in small business.

OBJECTIVE: 13.05 Explain the use of computers by entrepreneurs.

TIME: 1 Class Period (Cont'd. on next page)

ACTIVITY	RESOURCES
1. Ask students to brainstorm ways an entrepreneur could use a computer to manage his/her business and list the ways on the board.	Uses of Computers by Entrepreneurs (G1305-T1)
2. Show examples of ways computers are used by using word processing, database, graphics, and spreadsheet software applications.	Spreadsheet Ex.: Checking Account (G1305-T2) Database Ex: Lawn Care Business (G1305-T3) Graphics Ex: Pizza City (G1305-T4) and Ice Cream Flavors (G1305-T5)
3. Use the Checking Account spreadsheet to illustrate how a spreadsheet can be changed on the computer and will automatically recalculate itself. (This spreadsheet could be already entered into the computer and students could change the data in a cell and watch the computer recalculate.)	Spreadsheet Ex.: Checking Account (G1305-T2)
4. Use the Lawn Care Business transparency to illustrate how data can be searched for within a database. (Again, this may be done with the computer if the example has been saved in a database file.)	Database Ex: Lawn Care Business (G1305-T3)

COURSE:	**Exploring Business & Marketing**	
UNIT:	**Small Business/Entrepreneurship**	
COMPETENCY:	**13.00**	**Explain the roles of small businesses in the economy and the role of entrepreneurs in small business.**
OBJECTIVE:	**13.05**	**Explain the use of computers by entrepreneurs.**
TIME:	**1 Class Period**	**(Cont'd. from previous page)**

ACTIVITY	RESOURCES
5. Use the Pizza City Project Profits transparency to illustrate a graphic application. (Students could retrieve the chart from a previously-saved file, change some data, and redisplay the pie chart.)	Graphics Ex: Pizza City (G1305-T4)
6. Use the New Ice Cream Flavor Survey to illustrate what new flavor should be offered.	Ice Cream Flavors (G1305-T5)
7. Ask students to interview an entrepreneur to see how he/she uses a computer in the business. Have them write a report on the interview.	
8. Ask students to complete the word find puzzle.	Use of Computers Word Find (G1305-A1 and G1305-TK1)

G1305 (Concluded)

USES OF COMPUTERS BY ENTREPRENEURS

- INVENTORY CONTROL
- MAINTAINING FINANCIAL RECORDS
- MAINTAINING CUSTOMER INFORMATION
- RECORDS MANAGEMENT
- MARKET ANALYSIS
- MAILING LABELS
- MAILING LETTERS
- ADVERTISING FLYERS
- TELECOMMUNICATIONS
- PLANNING AND FORECASTING
- INCOME TAX RECORDS
- BUDGETING

SPREADSHEET EXAMPLE

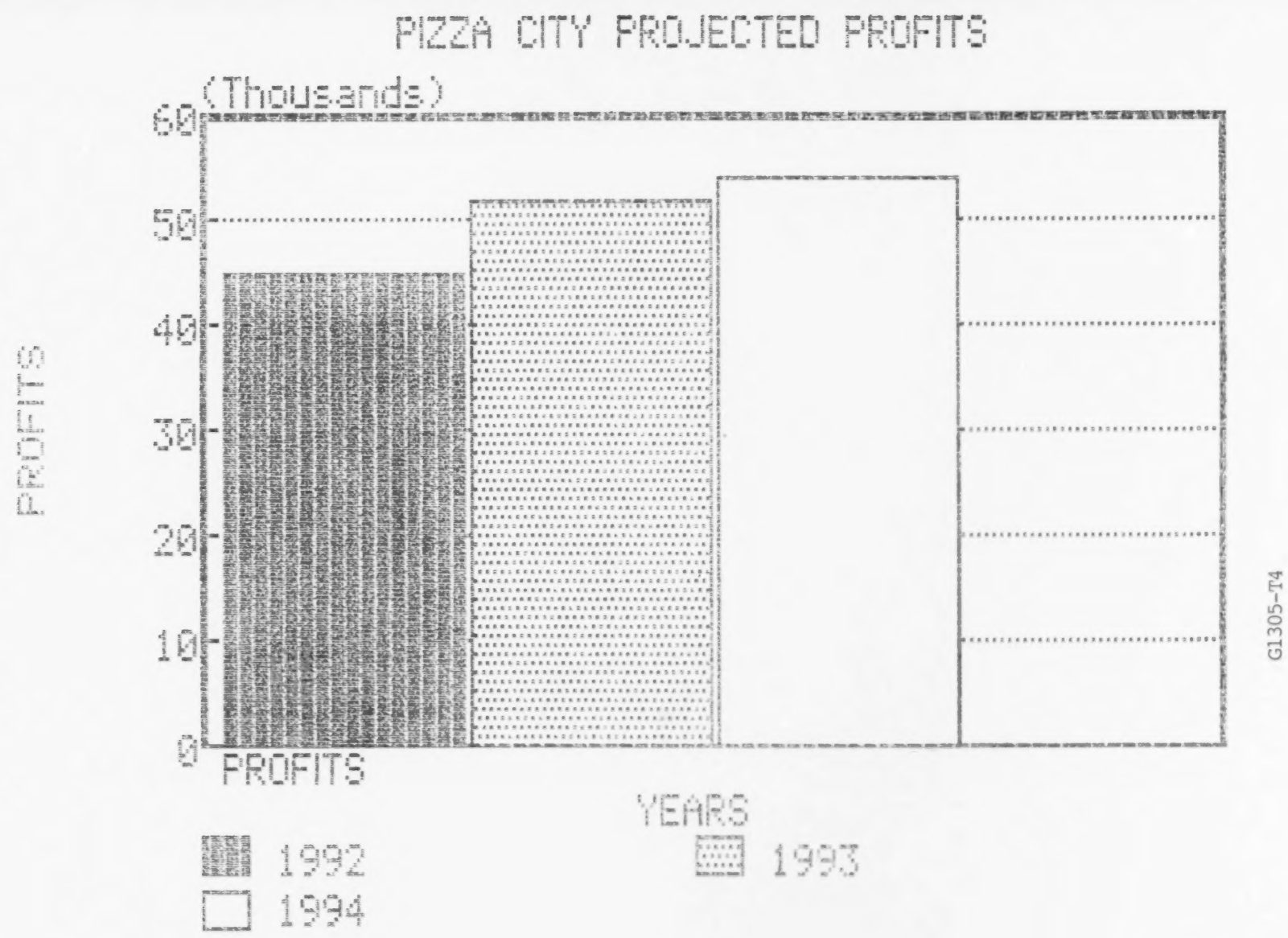
M & M COMPANY
CHECKING ACCOUNT
PARTIAL FOR JANUARY

CHECK	DATE	ISSUE/DEPOSIT DESCRIPTION	CHECK AMOUNT	DEPOSIT AMOUNT	BALANCE
					5976.35
302	JAN 10	DUKE POWER	175.00		6151.35
303	JAN 11	TELEPHONE CO.	56.25		6207.60
	JAN 12	SALES RECEIPTS		525.00	5682.60
304	JAN 12	OFFICE DEPOT	65.70		5748.30
	JAN 13	SALES RECEIPTS		498.00	5250.30

DATA BASE EXAMPLE

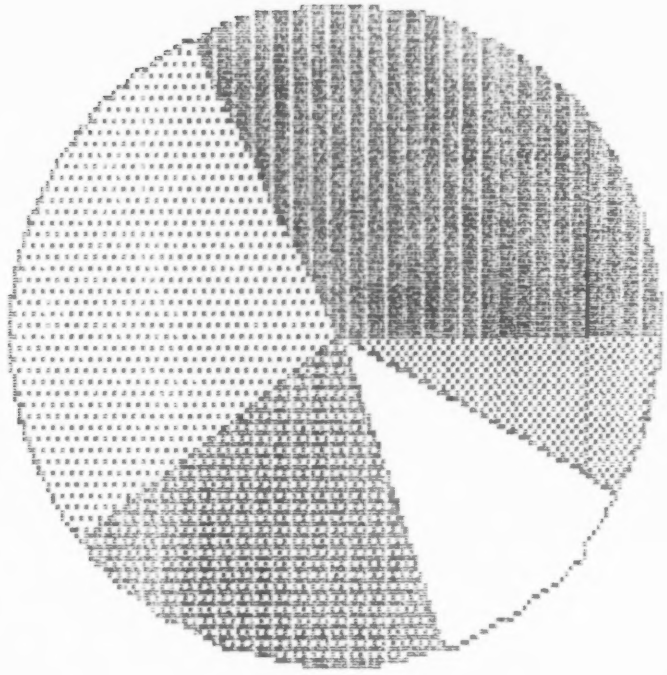
CUSTOMER DIRECTORY FOR THE LAWN CARE BUSINESS

LAST NAME	FIRST NAME	ADDRESS	CITY	ZIP
Duck	Donald	231 Disneyland Lane	Quacker	28700
Dumpty	Humpty	113 Wall Street	Egg	35429
Goose	Mother	24 Children Lane	Showtown	45629
Horner	Jack	31 Corner Street	Thumpton	45639
Lamb	Mary	201 School Lane	Fleeceton	45377
Spratt	Jack	231 Fat Lane	Leanville	28755


PIZZA CITY PROJECTED PROFITS
(Thousands)
60
50
40
30
20
10
0
PROFITS
PROFITS
YEARS
1992
1993
1994
G1305-T4

NEW ICE CREAM FLAVORS

FLAVORS



87 Choco Mud Pie

77 Mint Royal

52 Banana Fudge

32 Bubble Gum

22 Chunky Walnut

TOTAL PEOPLE CHOICES
270

G1305-T5

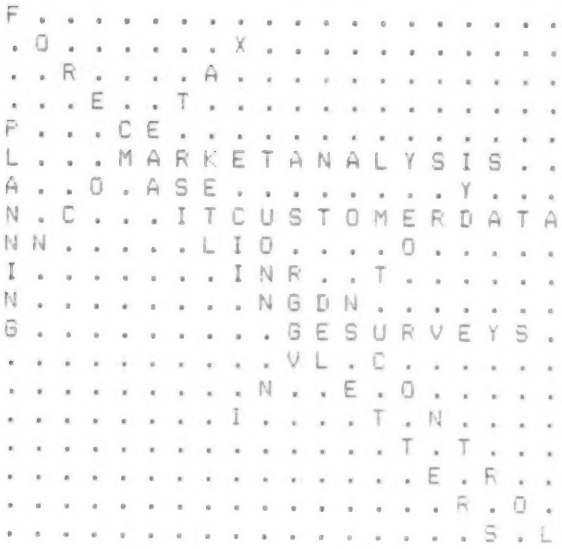
USE OF COMPUTERS

F Q P D T K S N E Z B A F Y U I I W E K
Y O N S D W S R X U H K W U N S F U R D
F F R C M N N A F W W T B U H X P P Y I
U S L E I V T T N S Q X I K F S V A Z J
P Z A B C E Z R B T O I T V A M K L I A
L E T G M A R K E T A N A L Y S I S G W
A X B O Q A S E I L D N O Y H T Y A V A
N P C G K N I T C U S T O M E R D A T A
N N I D K I C L I O Z L Q A O G X Q A M
I K C Y G R R O I N R W K T Y P F V H K
N J O J G D J D N N G D N T A V I A U N
G J A G H O K W I B G E S U R V E Y S H
M J E T A M P Y W K V L Q C S O G A A D
P K F X O K Q F Y N G C E S O X C M Q I
G K F W F Z B F I M W L U T O N D E E F
B W H F B Y P A W P Z H Y Y T H T D N A
I X P D B P L P M S J C I Z L E W R P R
X E W D C E V W H E I D Q O D U R S O X
O K K Q H X I N Q R O Y Z Y K Y O S P L

Can you find these words?

RECORDSCONTROL
CUSTOMERDATA
INVENTORY
MARKETANALYSIS
FORECASTING
PLANNING
MAILINGLETTERS
INCOMETAX
SURVEYS

Answer Key for: USE OF COMPUTERS



COURSE:	**Exploring Business & Marketing**	
UNIT:	**Small Business/Entrepreneurship**	
COMPETENCY:	**14.00**	**Evaluate personal interests and aptitudes in becoming an entrepreneur and simulate related activities.**
OBJECTIVE:	**14.01**	**Explain the characteristics and requirements of a successful entrepreneur.**
TIME:	**1 Class Period**	

ACTIVITY	RESOURCES
1. Have students brainstorm to decide what they think the characteristics of a successful entrepreneur should be. Write the answers on the board. Then use the transparency, "Characteristics of an Entrepreneur," for a comparison. 2. Divide students into small groups to devise questions which assess a person's entrepreneurial characteristics. Have each group write at least ten questions. A group leader will share with the large group. An sample question might be "Do you like to make decisions?" (The class results could be combined and put on the word processor to make a checksheet to use later in the unit.)	Characteristics of an Entrepreneur (G1401-T1)

CHARACTERISTICS OF AN ENTREPRENEUR

LIKES TO TAKE RISKS

HAS SELF-CONFIDENCE

MAKES GOOD DECISIONS

LIKES TO PLAN

WILLING TO DO A JOB NO MATTER WHAT IT TAKES

LIKES TO BE IN CHARGE OF THINGS

CAN BE FLEXIBLE

IS AN ORGANIZER

HAS LOTS OF ENERGY--IN GOOD HEALTH

GETS ALONG WITH PEOPLE

COURSE: Exploring Business & Marketing

UNIT: Small Business/Entrepreneurship

COMPETENCY: 14.00 Evaluate personal interests and aptitudes in becoming an entrepreneur and simulate related activities.

OBJECTIVE: 14.02 Examine situations encountered by entrepreneurs.

TIME: 2 Class Periods

ACTIVITY	RESOURCES
1. Explain where entrepreneurs may go to receive information about or help in starting a business using the transparency, "Where to Go to Get Help."	Where to Go to Get Help (G1402-T1)
2. Use the "Case Study" handout to allow students to develop their own solutions to the situations and then share them with the class.	Case Study (G1402-A1 and G1402-TK1)
3. Use a word processing program or a graphics program to have students create stationery for a business that does home parties for children. The stationery could be used for mailing letters or as a flyer for an advertisement.	Parties to Remember Sample Transparency (G1402-T2)
4. Have students write a radio or television spot to advertise the Parties to Remember business. Record the commercials and have students evaluate them for effectiveness.	

YOU ARE THINKING ABOUT STARTING A BUSINESS. WHAT RESOURCES ARE AVAILABLE TO HELP YOU BEGIN TO PLAN YOUR BUSINESS. WHERE CAN YOU GO TO GET HELP?

- Small Business Administration
- Library
- Chamber of Commerce
- Previous market surveys relating to the product or service
- Other small business owners in the area
- Wall Street Journal
- Magazines
- Newspapers--classified section
- Insurance agents
- Real Estate agents
- Attorneys
- Accountants
- Trade Associations
- Marketing and Financial Consultants

CASE ONE

Susan Bunko was trying to decide on a correct location to open her card shop. She had found two locations which might be right. One building was inside an established mall located in a very heavily populated area. The mall had proven to be a success, but she would have to rely on mall customers to purchase from the shop. The other building was along a main street in the suburb. She would have to rely on local customers for success. Rental expenses of the building were slightly higher for the mall location. Which location has the greatest advantages to assure her shop success?

CASE TWO

Bob Munsing was the owner of a very successful pet store. The pet store was located inside a large mall, and the rent had become more than he could afford. He has decided to move the pet store to a suburb shopping center. He must advertise his move in order to keep established customers, and he must attract new customers. This advertising campaign is very important to the continued success after the move. Bob must decide how he can increase his advertising strategies. He really cannot afford a large advertising budget, but feels he must increase it to insure start-up success. Should Bob increase his advertising budget? If so, what are some steps he should take in order to increase his budget this one time for the move? What are some inexpensive ways of advertising that would attract new customers and would enable him to keep his established customers?

EXAMINE SITUATIONS ENCOUNTERED BY ENTREPRENEURS

CASE ONE

TEACHER'S KEY

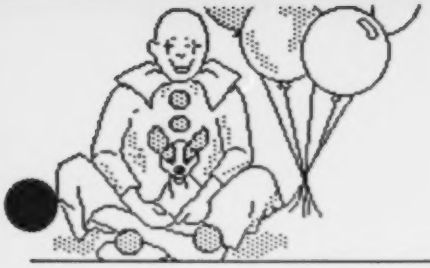
Susan Bunko was trying to decide on a correct location to open her card shop. She had found two locations which might be right. One building was inside an established mall located in a very heavily populated area. The mall had proven to be a success, but she would have to rely on mall customers to purchase from the shop. The other building was along a main street in the suburb. She would have to rely on local customers for success. Rental expenses of the building were slightly higher for the mall location. Which location has the greatest advantages to assure her shop success?

The location which would assure her shop the most success is the area inside an established mall. The number of possible customers is much greater; therefore, her percentage of sales will be greater. The rental expenses are higher, but the extra profits should exceed the expenses.

CASE TWO

Bob Munsing was the owner of a very successful pet store. The pet store was located inside a large mall, and the rent had become more than he could afford. He has decided to move the pet store to a suburb shopping center. He must advertise his move in order to keep established customers, and he must attract new customers. This advertising campaign is very important to the continued success after the move. Bob must decide how he can increase his advertising strategies. He really cannot afford a large advertising budget, but feels he must increase it to insure start-up success. Should Bob increase his advertising budget? If so, what are some steps he should take in order to increase his budget this one time for the move? What are some inexpensive ways of advertising that would attract new customers and would enable him to keep his established customers?

Bob should keep his advertising budget increase to a minimum. He could use the strategy of conducting grand opening promotional activities, such as reduced prices, giveaways, buy I get I free, etc. These are inexpensive techniques to draw new customers and ways to keep the existing customers. Another strategy would be to inform customers by mailing advertising flyers. He should mail invitations to his existing customers to visit the new shop.

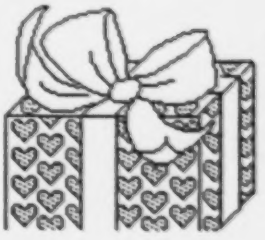


PARTIES TO REMEMBER

2345 Helium Way
Troy, NC 34824
919-567-CAKE

LET US CREATE A PARTY MEMORY FOR YOUR CHILD'S BIRTHDAY

G1402-T2



COURSE: Exploring Business & Marketing

UNIT: Small Business/Entrepreneurship

COMPETENCY: 14.00 Evaluate personal interests and aptitudes in becoming an entrepreneur and simulate related activities.

OBJECTIVE: 14.03 Simulate entrepreneurial activities using software applications.

TIME: 4 Class Periods (Continued on the next page)

ACTIVITY	RESOURCES
1. Ask the students to think of a business they would like to start. Students will become entrepreneurs. Students may work in groups or individually to complete the project. Students may sell a product or provide a service in their business. There is a handout of suggested businesses to start. Have the students complete "My Business Plan."	Examples of Businesses to Start (G1403-A1) My Business Plan (G1403-A2)
2. Ask the students to do a survey to determine the desire for their product or service. They should design a survey form on the computer, using "The Turner Shop for Gals" survey as an example.	Turner Shop for Gals Market Survey (G1403-A3)
3. Have students create a business card with a logo for their business on the computer. If the logo they desire is not available in the graphics program, they may cut and paste to complete the card, but the lettering should be typeset.	Logos on Different Business Cards (G1403-A4)

G1403 (Cont'd on next page)

COURSE: Exploring Business & Marketing

UNIT: Small Business/Entrepreneurship

COMPETENCY: 14.00 Evaluate personal interests and aptitudes in becoming an entrepreneur and simulate related activities.

OBJECTIVE: 14.03 Simulate entrepreneurial activities using software applications.

TIME: 4 Class Periods (Continued from previous page)

ACTIVITY	RESOURCES
4. Have the students create an advertisement for their business or a flyer for their business. Students may use the computer for this. The advertisement should include the four basic parts: illustration, headline, copy, and logo. 5. Have students present their project to the class and display the business "image" they have created with Activities 1 - 4.	

G1403 (Concluded)

EXAMPLES OF BUSINESSES TO START

Bed and Breakfast
Computer Sales
Home Decorating
Consignment Store
Limousine Service
Party Planner
Aerobic Instructor
Exercise Center
Sleep Away Camp
Catering Business
Teen Night Club
Cleaning Services
Lawn Care Service
House-Sitting Service
Crafts
Travel Business
Tour Guide Business
Carpet Cleaner
Automotive Tune-Up Business
Florist
Clothing Business
Sandwich Shop
Pizza Parlor
Ice Cream Shop
Computer Trainer
Daycare Center (children or for elderly)
Secretarial Services
Printing Service
Grocery Shopper
Janitorial Service
Rental Center
Real Estate Agent
Beauty Consultant
Marketing Consultant
Landscaper

MY BUSINESS PLAN

What kind of business do you want to have (retail, service, etc.)?

_____

What kind of product or service will you have and why? _____

_____

What will make people want to buy or use your product or Service?

_____

Is there a need for this type of business? _____

Do you have a good knowledge of this product or service? _____

What will be the name of your business? _____

Who will buy or use your service or product? _____

Where will you have your business (location)? _____

How much will you sell your service or product for? _____

How will you advertise your product? _____

Would it cost a lot to start your business? _____

Will you need to purchase a lot of equipment? _____

Will you need to purchase a lot of supplies? _____

Will you need a lot of financial assistance? _____

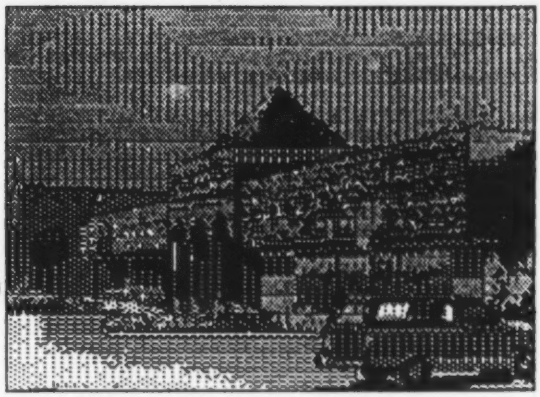
What kind of recordkeeping will you need? _____

Will you need to hire employees? _____

G1403-A2

MARKET SURVEY
TO EVALUATE THE POSSIBLE
OPENING OF A FRANCHISE

THE TURNER SHOP FOR GALS



1. How old are you?

   15-21 _____ 22-29_____ 30-35 _____ 36-45____ 45- up_____

2. Have you ever heard of **The Turner Shop for Gals**? _____

3. Have you shopped at one of our stores before?_____

If answered YES, at what store location?_____
If answered YES, have you purchased something from our store?_____

4. Would you purchase something from the **The Turner Shop For Gals**?_____

5. Would this mall be a convenient location for you to shop?_____

6. What size of clothing do you normally wear?

   Sizes 6-8 _____ Sizes 10-12_____ Sizes 14-16 _____

G1403-A3

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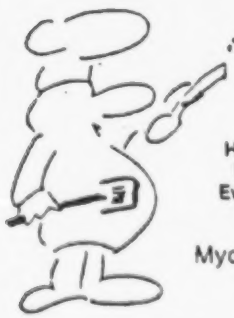

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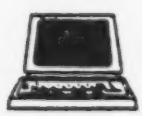

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G1403-A4

COURSE: Exploring Business & Marketing

UNIT: Small Business/Entrepreneurship

COMPETENCY: 14.00 Evaluate personal interests and aptitudes in becoming an entrepreneur and simulate related activities.

OBJECTIVE: 14.04 Evaluate personal options in pursuing a career as an entrepreneur.

TIME: 1 Class Periods

ACTIVITY	RESOURCES
1. Have students use the "Tree of Knowledge" handout to record the unit name and what type of small business they would like to start.	Tree of Knowledge--Appendix
2. Use the "Should You Be An Entrepreneur?" handout to have students evaluate personal traits or characteristics for becoming an entrepreneur.	Should You Be An Entrepreneur? (G1404-A1)
3. Use the handout, "Is This Career Right For You?" to have students evaluate personal options in pursuing a career as an entrepreneur.	Is This Career Right for You?--Appendix

SHOULD YOU BE AN ENTREPRENEUR?

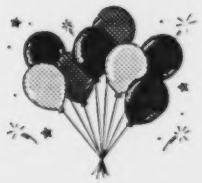
YES	NO	
____	____	1. From doing the activity on starting your own business, do you feel you could operate a business successfully?
____	____	2. Do you have self-confidence?
____	____	3. Are you willing to stick with a task until it is finished?
____	____	4. Do you take initiative to get things done?
____	____	5. Do you like taking risks?
____	____	6. Do you think on your own without someone having to encourage you?
____	____	7. Do you quit at the first sign of trouble?
____	____	8. Do you prefer taking orders?
____	____	9. Can you easily make decisions?
____	____	10. Are you a good organizer?
____	____	11. Do you like to plan something before you start it?
____	____	12. Do you like to delegate authority?
____	____	13. Are you good at assuming responsibility?
____	____	14. Are you good at communicating?
____	____	15. Do you get along well with people?
____	____	16. Are you creative and are you good at coming up with new ideas?

APPENDIX

IS THIS CAREER FOR YOU?

Your Name: _____

Unit Name: _____



1. List three things you learned from studying this unit.

2. After studying the jobs in this unit, name the job that you most enjoyed.

3. List the jobs skills needed to perform the job that you chose in Question 2.

GOOD LUCK!

4. List the traits needed to perform the job that you chose in Question 2.

5. The following questions will help you to decide whether or not a career in this particular category of jobs would be desirable for you. Place the appropriate answer beside each question. Then examine your answers and decide whether or not this is a category of careers would be feasible for you.

_____ Are you willing to meet the educational and training requirements for this group of careers?

_____ Does the salary range for this group of jobs meet your needs?

_____ Are the working conditions for this group of jobs suitable for you?

_____ Can you influence, guide, and lead others?

_____ Are you comfortable with office equipment and machines?

_____ Can you work under pressure?

_____ Are you willing to relocate if your employer asks you to?

_____ Can you think independently and make decisions?

_____ Can you set and meet long-term goals and objectives?

_____ Can you evaluate other's work and make constructive suggestions?

_____ Would you be happy in a career in this category for the rest of your life?

_____ Is you interest in this category high, medium, or low?
_____ # of "YES'S" *** _____ # of "NO'S"

BUSINESS EDUCATION
Equipment List

Exploring Business and Marketing

Equipment	Suggested Quantity	
	Per Lab/ Classroom	Per Student Ratio Item: Student
Microcomputer (one disk drive and 20 MB hard drive or network system)		1:2
Printer with stand	1:4 micros	
Switch Box	1:4 micros	
Computer software (see course guide/course competencies)		
LCD Projection Panel	1	
Computer table (adjustable and with adequate student workspace)	1 per computer	
Table desks (adjustable)		1:1
Adjustable posture chairs		1:1
Worktable	1	
Bookcase	1	
Storage cabinet with lock	1	

*Optional

BUSINESS EDUCATION
Supply List

Exploring Business and Marketing

Supplies	Suggested Quantity	
	Per Lab/ Classroom	Per Student Ratio Item: Student
Diskette storage file	2	
Diskettes		1:1
Consumable items such as Computer ribbons and paper		
Approximately $8 per student is needed.		

*Optional